DOCUMENT RESUME

ED 123 790 80 EA 008 347

AUTHOR McGovern, E. Gaye
TITLE Long Range Planning Guide for School Districts.
INSTITUTION Capital Area Intermediate Unit 15, Lemoyne, Pa.
SPONS AGENCY Bureau of Elementary and Secondary Education (DHEW/OE), Washington, D.C.
PUB DATE 75
NOTE 186p.; 186

EDRS PRICE MF-$0.83 HC-$10.03 Plus Postage.
DESCRIPTORS Administrative Personnel; *Community Involvement; Community Relations; Curriculum Development; Educational Assessment; *Educational Change; *Educational Objectives; *Educational Planning; Guides; Intermediate Administrative Units; Models; *Needs Assessment; *School Districts; School Systems
IDENTIFIERS Elementary Secondary Education Act Title V; ESEA Title V; *Pennsylvania

ABSTRACT

This school district guide examines the why of long-range planning, the relationship between long-range planning and educational change, the long-range planning process, community involvement in planning, the communicating of educational quality assessment and other needs assessment results with the public, needs assessment, prioritizing district goals, the organizing of the curriculum around district goals, and the specifics of the Pennsylvania long-range plan. (IRT)

****
* Documents acquired by ERIC include many informal unpublished *
* materials not available from other sources. ERIC makes every effort *
* to obtain the best copy available. Nevertheless, items of marginal *
* reproducibility are often encountered and this affects the quality *
* of the microfiche and hardcopy reproductions ERIC makes available *
* via the ERIC Document Reproduction Service (EDRS). EDRS is not *
* responsible for the quality of the original document. Reproductions *
* supplied by EDRS are the best that can be made from the original. *
****

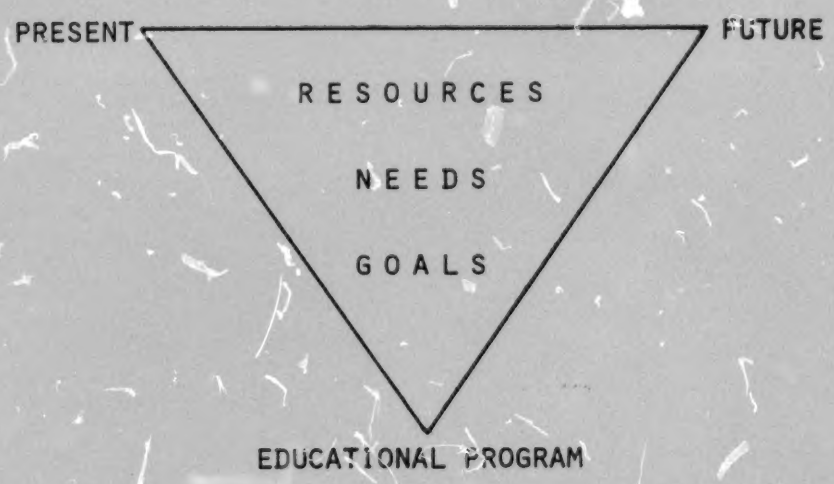
ED123790

Capital Area Intermediate Unit

LONG RANGE PLANNING GUIDE FOR SCHOOL DISTRICTS

U.S. DEPARTMENT OF HEALTH EDUCATION & WELFARE NATIONAL INSTITUTE OF EDUCATION
THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY.

PERMISSION TO REPRODUCE THIS COPYRIGHTED MATERIAL HAS BEEN GRANTED BY
Capitol Area Intermediate Unit
TO ERIC AND ORGANIZATIONS OPERATING UNDER AGREEMENTS WITH THE NATIONAL INSTITUTE OF EDUCATION. FURTHER REPRODUCTION OUTSIDE THE ERIC SYSTEM REQUIRES PERMISSION OF THE COPYRIGHT OWNER.



EA 008 347

Printed in U.S.A.
1975

Capital Area Intermediate Unit
26 North Ninth Street
Lemoyne, Pennsylvania 17043

Copyright © 1975 by Capital Area Intermediate Unit

Printed with funds provided under the Elementary and Secondary Education Act of 1965, Public Law 89-10, Title V, Part C, Project #2001960.

L O N G R A N G E P L A N N I N G G U I D E

F O R

S C H O O L D I S T R I C T S

by

E. Gaye McGovern
Program Specialist
Capital Area Intermediate Unit

1 9 7 5

TABLE OF CONTENTS

CHAPTER 1: WHY LONG RANGE PLANNING?

STUDY THE FUTURE FOR DIRECTION . . . . . Page 2

THE CHIN DOWN ADMINISTRATOR. . . . . Page 4

THE ANTICIPATORY ADMINISTRATOR . . . . . Page 5

CHAPTER 2: LONG RANGE PLANNING AND EDUCATIONAL CHANGE

WHAT ARE THE REASONS FOR EDUCATIONAL CHANGE? . . . . . Page 7

BRINGING ABOUT EFFECTIVE CHANGE. . . . . Page 9

CHANGE AS DEVELOPMENT. . . . . Page 10

SYSTEMATIC PLANNING FOR CHANGE . . . . . Page 11

CRITERIA FOR CHANGE VALIDITY . . . . . Page 14

CHANGE INHIBITORS. . . . . Page 14

EDUCATIONAL CHANGE: SELECTED REFERENCES . . . . . Page 17

CHAPTER 3: THE LONG RANGE PLANNING PROCESS

PLANNING . . . . . Page 19

GENERIC PLANNING MODEL . . . . . Page 20

PROJECT MANAGEMENT AND LONG RANGE PLANNING . . . . . Page 22

THE LONG RANGE PLANNING PROCESS: SELECTED REFERENCES. . . Page 26

CHAPTER 4: COMMUNITY INVOLVEMENT IN LONG RANGE PLANNING

THE PUBLIC AS A PARTNER. . . . . Page 28

HOW TO GET STARTED . . . . . Page 30

WHAT THEY DO AND HOW THEY DO IT. . . . . Page 32

WHO'S IN CHARGE HERE . . . . . Page 35

COMMUNITY INVOLVEMENT IN LONG RANGE PLANNING:
SELECTED REFERENCES . . . . . Page 36

CHAPTER 5: COMMUNICATING EDUCATIONAL QUALITY ASSESSMENT AND OTHER NEEDS ASSESSMENT RESULTS WITH THE PUBLICS A SCHOOL SERVES

PROS AND CONS: RELEASE OF TEST DATA . . . . . Page 38

GUIDELINES FOR RELEASE . . . . . Page 39

EXAMPLES OF EDUCATIONAL QUALITY ASSESSMENT COMMUNICATIONS . . . . . Page 42

COMMUNICATING NEEDS ASSESSMENT RESULTS: SELECTED REFERENCES . . . . . Page 44

CHAPTER 6: WHERE WE ARE: NEEDS ASSESSMENT

WHAT IT IS . . . . . Page 46

NEEDS ASSESSMENT AND DISTRICT GOAL SETTING . . . . . Page 48

NEEDS ASSESSMENT BASED UPON LEARNER NEEDS. . . . . Page 51

NEEDS ASSESSMENT IN AFFECTIVE AREAS. . . . . Page 53

WHERE WE ARE: NEEDS ASSESSMENT: SELECTED REFERENCES. . . Page 57

CHAPTER 7: WHERE WE WANT TO BE: PRIORITIZING DISTRICT GOALS

GOAL PRIORITIZATION AND NEEDS ASSESSMENT . . . . . Page 62

PRIORITIZATION AND EDUCATIONAL QUALITY ASSESSMENT. . . . . Page 62

RANKING GOALS ON THE SCHOOL STATUS REPORT. . . . . Page 63

RANKING GOALS ON EDUCATIONAL PHILOSOPHY. . . . . Page 65

LONG RANGE PLANNING APPENDIX C: ANALYZING EDUCATIONAL QUALITY ASSESSMENT. . . . . Page 68

PRIORITIZATION: FLOW OF EVENTS. . . . . Page 69

PRIORITIZATION: EDUCATIONAL QUALITY ASSESSMENT RESULT RELEASE. . . . . Page 70

ADDITIONAL APPROACHES TO PRIORITIZATION. . . . . Page 72

CHAPTER 8: PLANNING HOW TO GET THERE: ORGANIZING CURRICULUM AROUND DISTRICT GOALS

GOAL DEVELOPMENT AND DISTRICT CURRICULUM . . . . . Page 74

CURRICULUM DEVELOPMENT STAGES AND FORMAT . . . . . Page 77

CHAPTER 8 (Continued)

INTERVENTION STRATEGIES FOR THE TEN GOALS OF QUALITY EDUCATION . . . . . Page 87

PLANNING HOW TO GET THERE: ORGANIZING CURRICULUM AROUND DISTRICT GOALS: SELECTED REFERENCES. . . . . Page 95

CHAPTER 9: THE PENNSYLVANIA LONG RANGE PLAN

STATE EMPHASIS ON CURRICULUM. . . . . Page 98

PROCESS APPROACH. . . . . Page 101

STEPS IN PREPARING THE LONG RANGE PLAN. . . . . Page 108

FLOW CHART OF LONG RANGE PLANNING ACTIVITIES. . . . . Page 108

REVIEW CRITERIA . . . . . Page 113

COMPLETING THE LONG RANGE PLAN SECTION BY SECTION . . . . . Page 114

QUESTIONS AND ANSWERS ABOUT THE PENNSYLVANIA LONG RANGE PLAN . . . . . Page 166

THE PENNSYLVANIA LONG RANGE PLAN: SELECTED REFERENCES. . . . . Page 171

CROSS REFERENCE: THE PENNSYLVANIA LONG RANGE PLAN AND LONG RANGE PLANNING GUIDE FOR SCHOOL DISTRICTS. . . . . Page 174

CHAPTER 1:

WHY LONG RANGE PLANNING?

PAST PRESENT FUTURE

STUDY THE FUTURE FOR DIRECTION

> Like people and plants, organizations have a life cycle. They have a green and supple youth, a time of flourishing strength, and a gnarled old age . . . . an organization may go from youth to old age in two or three decades, or it may last for centuries.[1]

PROBLEMS
PROGRAMS

Educational institutions have many stages for potential growth. Various stresses, crises and pressures present indispensable opportunities for them to develop as flexible organizations responsive to pupil needs. Organizational dry rot sets in when educational institutions react to opportunities for growth with rigidity and retrenchment.

How can educators determine where they are heading as they rush headlong into the future? Basically by determining the answers to three questions: "Where are we now?", "Where do we want to be?", and "How will we get there?" These steps are discussed in greater detail in Chapters II and III.

---

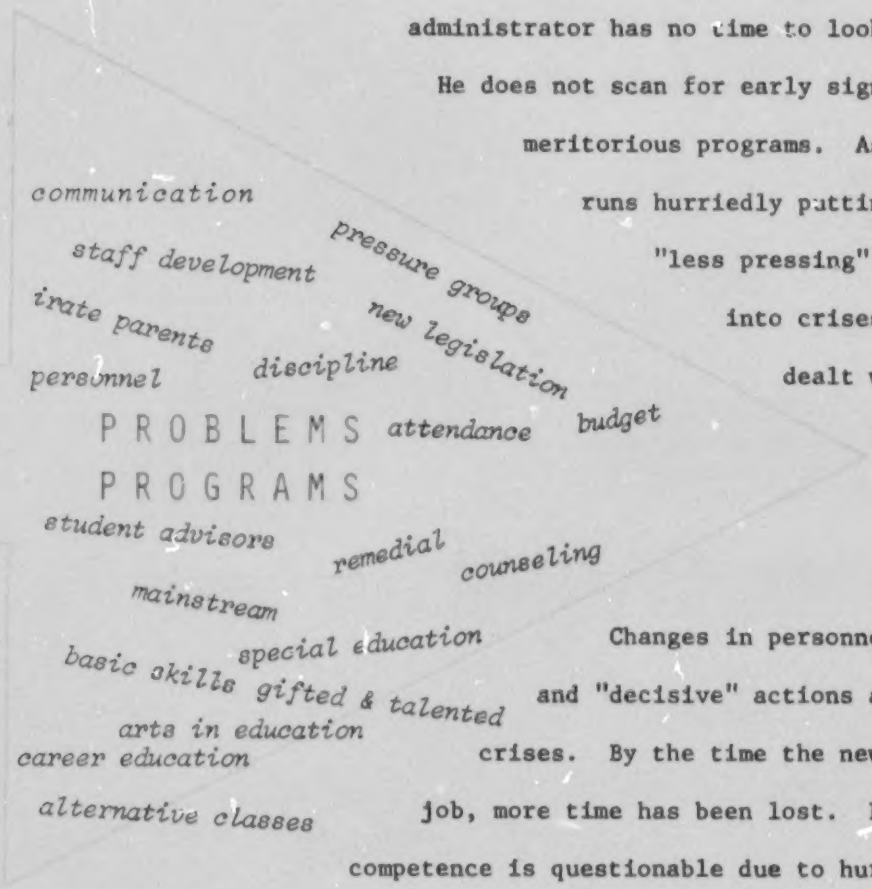
1 Gardner, John W. "How to Prevent Organizational Dry Rot," Harper's Magazine, October, 1965, p. 20.

Educators must study the future. This is their only assurance that they can help to shape the quality of the future through education, or for that matter, help to shape future education. Students need to learn skills and attitudes which will be useful to them in the future. Educators cannot accomplish this alone. They must involve the community and political systems in comprehensive planning efforts. Schools are not the sole change agents but they are a powerful resource for change. Long range planning for our schools can help bring a better future into being. Prophets using PERT (Program Evaluation Review Technique) and synergistic computer processes may predict, but the undefinable aspects of human behavior must also be accounted for. Educators are in a position to provide such reality testing to regional planning boards and other collaborative long range planning projects.

PAST PRESENT FUTURE

THE CHIN DOWN ADMINISTRATOR

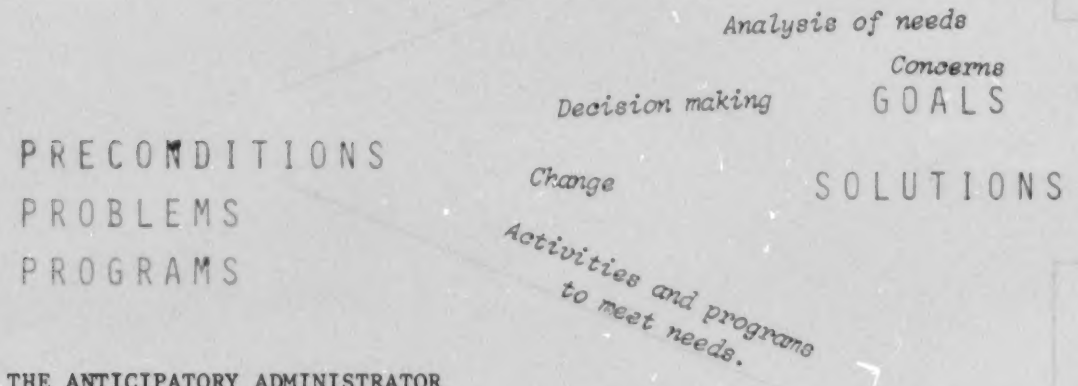
Buried in each emergency as it arises, the chin down administrator has no time to look up or to think ahead. He does not scan for early signals of danger or for meritorious programs. As pressures build, he runs hurriedly putting fires out, cancelling "less pressing" appointments which grow into crises later and must be dealt with anyway.



Changes in personnel and other visible and "decisive" actions are made to solve the crises. By the time the new people know their job, more time has been lost. Frequently their competence is questionable due to hurried investigation of candidate qualifications and job needs. Meetings become the issuing of instructions with some opportunities for listeners to approve. Usually programs are negative crash basis instructions. Stop. . .! Hold up. . .! and positive programs are deferred. Calls interrupt conferences and meetings. Sadly, the chin down administrator is convinced that the school district is lucky to have him with his energy and important connections.

PAST PRESENT FUTURE

All of us have a little of this administrator in us. As a result we question the value of planning ahead. We do not keep our five year and one year objectives current. We neglect updating our needs assessments. Until the chin down administrator in each of us can be made to stop running busily about and take a look ahead, the same crises will reappear because their basic causes will still exist.



THE ANTICIPATORY ADMINISTRATOR

An effective administrator anticipates human and program needs throughout the day rather than being dominated and preoccupied by chance events as they occur. Awareness, selectivity and planning for priority use of the anticipatory administrator's time and the resources at hand produce greater attention to educational programs in accordance with pupil needs. A systematic approach to decision making and an orientation toward change enables the anticipatory administrator to deal with the accountability issue by being able to define which programs are being offered to meet specific needs.

Long range planning is worth the effort. Close the office down and determine what the district goals are. Determine what the staff is trying to achieve. What does the community expect from the schools? What are the schools providing? How can these needs be met? Guidelines for educational long range planning by the school district administrator are explored in detail in subsequent chapters.

CHAPTER 2:

LONG RANGE PLANNING AND EDUCATIONAL CHANGE

WHAT ARE THE REASONS FOR EDUCATIONAL CHANGE?

Why should education change? It is comfortable to leave things as they are. Naturally some sameness is necessary for continuity. On the other hand, many external pressures on schools foster change, or at least confront educators with the possibility that changes may be needed.

One of these pressures is the power of the media. Articles continually present innovative school projects and parents read these articles widely. Parents want to know what local schools are doing to insure that all children learn when they read about "Schools Without Failure" in Dr. Glasser's laboratory school or "Mainstreaming" of children with learning exceptionalities in Pennsylvania.

Another impetus for change is government and foundation support. Such funds are less available than they were previously, but they do provide support for research and innovation which otherwise would not take place. The knowledge explosion, including what we call future shock, is another factor in change. Power equalization and interdependence are also change agents. Teachers and administrators are in a leveling process. The participative model, student rights, teacher militancy, and taxpayer's revolts all point to discussion, negotiation, and dialog to find mutually productive solutions and directions in education. This equalization of power and interdependence has replaced the authoritative model of school administration.

Adaptation is continually invigorating education. In action-research, teachers apply ideas developed in universities and laboratory schools to their own classroom settings. This open-ended research enables teachers to

expand their techniques within the resources at hand in their own classrooms. Many teachers work with colleagues in using adaptation and action-research to improve education by informally exchanging ideas and solutions they have found to problem situations in the classroom.

The commitment to self-renewal as an individual and an institution is perhaps the most vital catalyst for change in schools today. There was a time when schools were essentially preservers of the culture. They were homogenizers. Today, schools are expected to teach basic skills and to assist students in self-actualization. Institutions are becoming aware of the need for continual self-renewal.

The view of educational institutions as a mirror of the culture conveying values, traditions, and information from one generation to the next is fairly static. It has little validity today. Education now is seen more as an organic situation. The educational institution is an integral part of the community, and of society at large. The student is not isolated from his family at school. We are aware that he brings his family background, his problems, his concerns and the benefits of his home to school with him. All these variables create an ebb and flow producing a need for a responsive educational setting rather than a static one.

Organic systems require a dynamic flow at all times to maintain essentail life processes. This flow is a beneficial one and contributes to the state of health called homeostasis. If organic systems did not maintain these changes, they would sicken and die. Our cells continually require input, output, stimulation, nourishment, and so forth. Recognizing that the responsive school today is an organic institution rather than a static one, the need of the school to change becomes apparent, not for the

sake of changing, but for the sake of survival. To meet student needs, to communicate with the publics served by a school, to lessen intergroup tensions within the school and to create valid educational alternatives, change is essential in schools today.

BRINGING ABOUT EFFECTIVE CHANGE

To bring about effective change, to avoid faddism, and to impact upon attitudes, change must be part of a planned process. Change is not team teaching, needs assessment, management by objectives, or any other technique in itself. Change is a process which institutions and individuals experience as they proceed through discreet steps toward the achievement of a goal. These steps are presented below.

EFFECTIVE CHANGE SEQUENCE

INVOLVE STRUCTURES

↓

ALTER INTERACTIVE PROCESSES

↓

MODIFY ATTITUDES

The first step involves awareness and interest in the change potential as an organic process. Change begins with the examination of the structures of the institution. The school building, its internal operating pattern, hierarchial structures within the district and within the buildings, interrelationships between teachers and students, and community actions groups are all structures and resources with can be brought to bear to effect change. The first step in bringing about effective change is to involve

these structures in the change process. The educational needs perceived by these structures must be analyzed.

Interaction is the focus of the second stage in the effective change sequence. Interaction has the greatest impact on the modification of attitudes. Saying that we will change the attitudes of students toward teachers, or that teachers must start motivating students instead of conveying content is starting at the wrong end. The planned process needed to achieve effective change is directed toward an educational purpose. What is the goal? What do we want from education? Once these answers are clearly defined they become goals for the change process and the interaction process can be altered so that everything that takes place supports the identified goals.

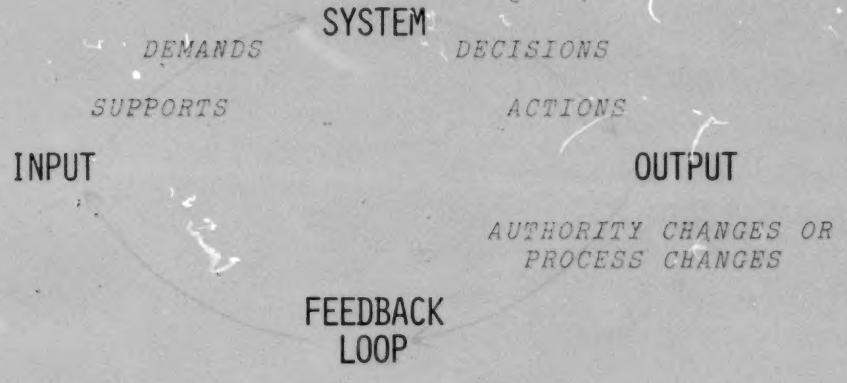
The third step is the crucial one in determining future performance. Unless attitudes are modified, people will proceed as they did prior to steps one and two. Once the need for change has been identified and possible change strategies have been evaluated, the closed loop system can provide a model for constant reinforcement and modification. Change than becomes a developmental process which gradually modifies attitudes as people become increasingly committed to the process in which they are involved.

CHANGE AS DEVELOPMENT

Change is most effective when it is viewed as development. It can be revolutionary. It can be mandated. It can be by fiat. These approaches to change are only surface programs. The developmental change process can change community, parent, teacher, and student attitude. Developmental

change involves three stages: innovation, diffusion, and integration. A district identifies areas in which to innovate. Following pilot implementation, dissemination, and evaluation of the innovation, the feedback process will determine whether the change should be dropped or modified. If it is modified it will be expanded as others will model their behavior after the pilot program. Some educators may adapt the pilot to their own needs while others will adopt it as is. This second stage of development is called diffusion. Finally, changes become widely accepted practices and at this level of development they have become integrated into the institution. Commitment of participants is firm at this point. The change has become part of the value system for education; it has become a part of what participants believe and thus of how they perform.

SYSTEMATIC PLANNING FOR CHANGE



The closed loop system, illustrated on the preceding page, indicates an ongoing process of output, various decisions, actions carried out to support the decisions, and feedback. The feedback is the most important element of the system as it is the part that makes the system dynamic. Constant evaluation and reassessment permit many people to have an active role in deciding to what degree current resources and programs are achieving current goals. By stating the goal, rather than the problem, as the focal point of the system, all resources and methods which might have an effect on the goal are considered.

Use of a system approach alone cannot create change. The forces involved in running each institution must be evaluated and change strategies developed to achieve each desired goal. The elements of each institution and its resources can be harnessed to foster change. Study of the ways in which change has occurred in the institution in the past will assist in planning such strategies of involvement.

The systems approach gives greater assurance that the desired change will come about. The continual evaluation and program modification produce a greater degree of goal achievement than random activities directed at solving each crisis individually.

Systematic feedback can also be helpful to administrators in maintaining a balanced evaluation of their clients' views of the schools. To often a phone call, the comment of a board member, or a rumor produces a zig zag pattern of reactions rather than deliberate evaluation followed by action. Systematic gathering of feedback and notation of the random type of input which occurs in the political milieu of school administration will provide a solid basis for program evaluation.

As an example, the local power structure distills either to an authoritarian, monarchial, monopolistic political system to a participative, democratic structure, or to a competitive one. A school board might be composed of bankers, well-educated housewives, a lawyer, and several businessmen. The other major power structure in town might be the hospital board. The hospital begins building an open space education/community building. The school board is very aware of the presence of the hospital board in the community power base. Some members overlap, others rub elbows all the time in town. The school board is not going to be left behind, and before the superintendent realizes it, the new school building program is looking into open space construction.

A school administrator should analyze the power structure in each situation. It varies at each level for a community, school building, or school district. If the power structure is participative, the whole school board, city council, and other leaders should be involved from the beginning of the project. In this case, they should all have the opportunity to take part in the exploration and educative processes such as visiting other open space buildings, attending conferences, reporting to committees, etc. Communication should be continual. If the situation is very authoritarian, if the mayor "calls the shots," or nothing happens in a school unless the principal learns about it in advance, all change efforts should be aimed at permission to explore the proposal. Keep the leader informed and continually work with the key person. In this case, communication with the leader will be much more important to the success of the project than communication to the community at large.

The district goal might be to increase school-community communication and cooperation. The most effective structure to meet that goal locally

must be defined. Systems in the district, sub-systems within the school, and within the community must be specifically identified. Is there an elite group which runs the community? Or, do competitive politics govern the community? What are the characteristics of the structures which will be involved in the change? These elements are all resources in the change process, beginning with the structures themselves. Latent power bases will be identified in this analysis. Structures can be created to facilitate the interactive processes needed to bring about change.

CRITERIA FOR CHANGE VALIDITY

Some criteria for evaluating change validity may be of value to the educator.

- Consider whether the proposed change incorporates broad values and psychological principles of education.
- Determine whether the change will help keep schools in touch with the times and with the future needs of society.
- Ask whether the change will make schools more humane and flexible.
- Consider whether the change will buoy up an existing supportive educational climate or whether it will assist in creating such a climate where it is lacking.

CHANGE INHIBITORS

Many factors inhibit change in education. Among these are: negative attitude, lack of documentation, reluctance to initiate, lack of a network of change agents, lack of school linkages, lack of colleague support, poor reaction to experimentation, adoption without adaption, need for feedback, need for continuing education, conservation of social and political structure, financial restrictions, and lack of sustained leadership. Inherent in this list, which is far from inclusive, are the seeds of change facilitators.

Given a careful analysis of the factors for and against change in a given institution, change oriented activities can be planned. Perhaps planned communication, documentation and dissemination are needed. Public support can be a matter of awareness, information, and education about the need for a change. Reluctance and negativism may be rooted in previous changes which were no better than bandaids for major wounds. For example, a course in minority history may not solve interracial strife and deep-rooted misunderstanding.

Lost credibility may be rebuilt by a far reaching needs assessment and planning involving community persons, school staff, and students. Administrators can establish credibility by encouraging communication, being persistently supportive, encouraging teachers, students, and citizens to come forward with ideas, and involving the community in the schools. Regular dissemination of program evaluations and modifications, examination of the quality of communication among the staff and with the community, and insuring that the staff is knowledgable about school programs and future needs can also increase readiness for change. Listen to resistence when it is stated and remember that real participation is based on respect.

To simply reorganize the administrative structure or rewrite the curriculum is to deal at a superficial level with educational needs. The likelihood of change through such steps is minimal. First, identify the target and as soon as the need for change is identified, the widest possible involvement should take place. This involvement is the key to the subtle educational process which builds commitment and insures evolutionary, meaningful changes directed toward felt educational needs.

The following excerpt from Bennis, Benne, and Chin's The Planning of Change is a comprehensive guide to successfully meeting resistance to

needed change in educational institutions:

A. Who brings the change?
   1. Resistance will be less if administrators, teachers, Board members, and community leaders feel that the project is their own--not one devised and operated by outsiders.
   2. Resistance will be less if the project clearly has wholehearted support from top officials in the system.

B. What kind of change?
   3. Resistance will be less if participants see the change as reducing rather than increasing their present burdens.
   4. Resistance will be less if the project accords with values and ideals which have long been acknowledged by participants.
   5. Resistance will be less if the program offers the kind of new experience which interests participants.
   6. Resistance will be less if participants feel that their autonomy and their security is not threatened.

C. Procedures in instituting change
   7. Resistance will be less if participants have joined in diagnostic efforts leading them to agree on what the basic problem is and to feel its importance.
   8. Resistance will be less if the project is adopted by consensual group decision.
   9. Resistance will be reduced if proponents are able to empathize with opponents; to recognize valid objections; and to take steps to relieve unnecessary fears.
   10. Resistance will be reduced if it is recognized that innovations are likely to be misunderstood and misinterpreted, and if provision is made for feedback of perceptions of the project and for further clarification as needed.
   11. Resistance will be reduced if participants experience acceptance, support, trust, and confidence in their relations with one another.
   12. Resistance will be reduced if the project is kept open to revision and reconsideration if experience indicates that changes would be desirable.[2]

---

2 Bennis, Warren G. Benne, Kenneth D., and Chin, Robert, The Planning of Change, second edition, Holt, Rinehart and Winston, Inc., New York, New York, 1969, pp. 496-7.

EDUCATIONAL CHANGE: SELECTED REFERENCES

Alexander, William M., Changing Curriculum Content, ASCD, Washington, D.C., 1964.

Andersen, Hans O., "Facilitating Curricular Change: Some Thoughts for the Principal," NASSP Bulletin, January 1972, pp. 89-99.

Bennis, Warren G., Benne, Kenneth D., Chin, Robert, The Planning of Change, second edition, Holt, Rinehart and Winston, Inc., New York, 1969.

Bennis, Warren G., and Schien, E. H., ed., Personal and Organizational Change Through Group Methods, Wiley and Sons, New York, 1965.

Fox, Robert S., Schmuck, Richard, et al, Diagnosing Professional Climate of Schools, NTL, Fairfax, Virginia, 1973.

Goodlad, John I., Klein, M. Frances, Behind the Classroom Door, Charles A. Jones Publishing Company, 1973.

Havelock, Ronald G., A Guide to Innovation in Education, University of Michigan, Ann Arbor, Michigan, 1971.

Hearn, Norman E., "The Where, When, and How of Trying Innovations," Phi Delta Kappan, February 1972, pp. 358-374.

Johnson, Mildred, Nussel, Edward J., "Who Obstructs Innovation?" Journal of Secondary Education, January 1969, pp. 3-11.

Jones, Richard V., Jr., "Tuning Up The Staff For Organizational Change," Journal of Secondary Education, December 1969, pp. 339-345.

Lawrence, Paul R., "How to Deal with Resistance to Change," Harvard Business Review, January-February, 1969.

Leeper, Robert R., ed., Strategy for Curriculum Change, ASCD, Washington, D. C., 1965.

Lippitt, Gordon L., Organization Renewal, Appleton-Century-Crofts, New York, 1969.

Lippitt, Gordon L., Visualizing Change: Model Building and The Change Process, NTL, Fairfax, Virginia, 1973.

Marrow, A. J., Bowers, D. G., and Seashore, S. E., Management By Participation, Harper and Row, New York, 1967.

Novotney, Jerrold, ed., Change Around the Globe, UCLA Educator, Vol. 17, No. 1, Fall 1974, Los Angeles, California.

Payne, Arlene, The Study of Curriculum Plans, NEA, Washington, D. C., 1969.

Sarason, Seymour, B., The Culture of The School and the Problem of Change, Allyn and Bacon, Inc., Boston, Massachusetts, 1971.

Simmons, S. Bart, "Successful Innovation Through Effective Educational Leadership," Journal of Secondary Education, March 1971, pp. 117-120.

CHAPTER 3:

THE LONG RANGE PLANNING PROCESS

PLANNING

> Planning is the active consideration of what must be done to achieve a desired future event. It requires the system. . .to predict not only the sequence of activities but also intervening variables and their impact.[3]

In preparing an educational plan, a product management model is followed. First, the product or plan is produced. Second, it is delivered, in this case, through instruction. Third, score is kept on a cost benefit basis regarding the support services, teachers, material needs, etc., needed to keep the program going. Fourth, the evaluation of the first three steps, including personnel performance and pupil achievement is essential to determine needed program modification and to make decisions regarding program continuance.

Developing commitment to priorities established by a committee in staff who have not been involved in the developmental process can be a problem. This can be resolved to a great extent by considering what can be offered to the teaching staff to train them for program delivery. Such professional growth must be ongoing in its support to be effective. Participative management is another valuable way of building commitment. The involvement of students and broad levels of school staff and community provides superior planning results as well as commitment for program implementation.

In training personnel to complete a long range planning procedure, balance is essential. Objective writing should not be overemphasized, although a basic understanding of this technique is necessary. The overall

---

3 _____, How To Do It Manual, Pennsylvania Department of Education, 1974, p. 2.

picture of long range planning for educational performance should be the focal point of such training.

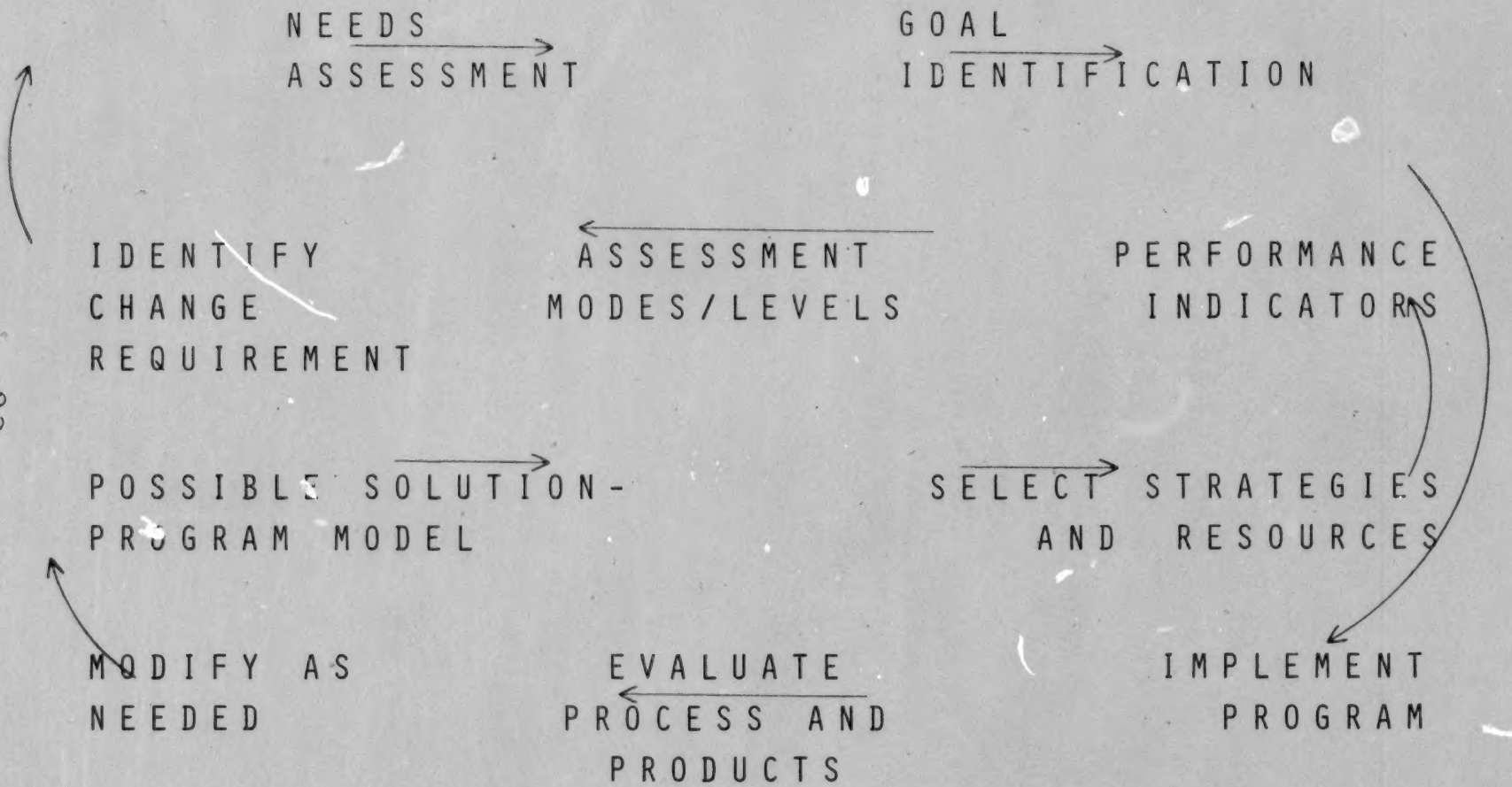
In making an educational program plan, "who does what" should be considered. The educational plan should also be based upon needs assessment. A needs assessment which does not include a plan to accomplish recommendations once they are identified, is not constructive. Staff capability should be sampled in preparation for implementation of identified needs. The interface between district objectives and objectives underlying commercial material in use must be considered as well.

GENERIC PLANNING MODEL

Long range planning follows the basic generic planning model. Examples of planning models are contained in the references listed at the end of this chapter. The models contained in Educational System Planning by Roger Kaufman and in Comprehensive Planning in Education by Kenneth Pack may be especially helpful in designing a local planning strategy. Seven steps are essential in any complete planning model. These are:

1. Needs assessment
2. Prioritization
3. Selection of criteria and procedures (match and discrepancy procedures for resources to implement the program)
4. Evaluation (both formative and summative)
5. Quality assurance (a mechanism to maintain minimum standards of performance)
6. Status reporting on an annual basis (prepare the board, funding agency, public, or for district self-evaluation. Include program, finances, evaluative procedures and recommendations.)
7. Feedback (formal and informal)

This concept is illustrated in the figure on the following page and in subsequent paragraphs.



LONG RANGE PLANNING PROCESS

PROJECT MANAGEMENT AND LONG RANGE PLANNING

The concept of project management and planning has direct applicability to the development of a school district long range plan. To be most effective, project management must have the support of the top administrative staff, a specific project manager should be identified (the long range planning coordinator), and the ongoing educational program should provide facilitative assistance.

A "project" is goal oriented by definition. Project management becomes "management by objectives" as all activity in the project is directed toward defined goal and its objectives. These objectives are commonly expressed as designated "performance indicators" or "performance specifications" which incorporate explicit directions as to what is to be done and the criteria to be used to evaluate the level of accomplishment.

Project planning is futuristic and involves some level of risk because of the unforeseen variables leading to the ultimate goal. Projects deliver some definable end product and they have a time schedule which includes a starting date and completion date. Projects also have cost limitations or established budgets which reflect a wide range of resources required to achieve the desired goal.

The concept of a project can be contrasted with those activities of schools which are not projects. An established curriculum or program of a school which is continuously operational is not considered a project. A program which does not have a specific completion time or where costs are compared to a general budget rather than against performance criteria is not a project. Activities such as accounting, payroll, cafeteria operation, or

the regular ongoing programs of the various teaching departments are not projects.

There are certain techniques involved in the management or projects. These include designation of a project manager and defining phases of project operation. The project manager's job begins in the planning stage and ceases at project termination. Activities or programs which are not projects are directed by people often designated as program coordinator, supervisor, administrator, or director. Such provisions are usually continuous and do not terminate at a specific point in time. The role of a project director involves managerial duties such as planning and integrating the activity of people and equipment from many functional areas of the school district to assemble resources, as well as evaluating, making and implementing decisions affecting the project process.

The project management mission can be grouped into four phases of operation. The phases are: planning, preparation, control, and termination. The planning phase includes defining the projects, planning the work flow, determining schedules and resources, and calculating cost of materials, service, and manpower. The preparation phase consists of acquiring the equipment, personnel, and materials, and organizing them so that the project can begin as planned. The operational control phase consists of those activities which are aimed at detecting deviations, analyzing the circumstances causing each deviation, making decision in order to eliminate the deviation and implementing decisions to insure project success. The termination phase includes those activities which deal with ending the project. This phase occurs after completion of the goal and involves transferring records, equipment, facilities, and people to other projects.

Some of the ongoing activities existing in local school districts could be re-oriented as projects. Some examples are curriculum or textbook selection, staff orientation and development, and the development and implementation of new academic programs.

There are many important advantages to using project management in the local school district. Changing an activity to a project forces the local school district to ask: What do we want to attain? How do we want to accomplish it? What are the possible levels of performance? What is not to be included? What are the milestones? What is to be delivered? How will we evaluate effectiveness of the program? When the local school district answers these questions, it is examining in detail the elements of a program in terms of its goal. In this manner, the local school district efforts become focused. Plans which detail the time sequence of various activities, allocation of resources, specific performance outcomes and evaluation of efforts constitute a management by objectives approach greatly increasing the efficient use of staff, time, and facilities.

There are some problems connected with the use of project management in the local school district. Some activities are extremely difficult to identify with a goal, a start and stop time, and an end product. The implementation of a project management system into an existing school district functional organization may result in a more complex organizational structure. Such a change, like most organizational changes, may be foreseen by some individuals as infringement upon their authority and create feelings of anxiety and insecurity. At times it is difficult to obtain qualified project managers for each project exactly when needed.

When a school district makes a commitment to a project management mode of operation, the advantages are many. The accomplishment of

planned goals and cost benefit knowledge improve the public relations function with the community concerning the school operations. Project management requires that top level administrators delegate authority and decision-making to a greater number of subordinates. While the superintendent maintains overall responsibility and accountability, delegation of authority and decision-making can result in significant staff development and the creation of a reservoir of more capable people within the school district. Project management can be used within the district to improve overall effectiveness and efficiency. It can spotlight resource needs for the support of a wide range of activities which implement school programs. It can also strengthen the evaluation function by more clearly specifying the performances being sought. The project management process permits an examination of the deviation of operations from their plans, and thereby, makes it possible to more regularly identify and prevent potential problems arising in the operation of the project.

In summary, project management capability allows the local school to benefit from clear goal statements, detailed plans, specified time for achievement, diverse resource allocation and performance, and an orderly review procedure for all educational programs. This approach is clearly fostered by the emphasis of the current Pennsylvania Long Range Plans upon educational needs assessment, goal setting, and program and evaluation in each school district.

THE LONG RANGE PLANNING PROCESS: SELECTED REFERENCES

Argyris, Chris, Management and Organizational Development, McGraw-Hill Book Company, New York, New York, 1971.

Bennis, Warren G. et al, The Planning of Change, Holt, Rinehart and Winston, Inc., New York, New York, 1969.

Cummings, C. Peter, Educational Project Management Instructional System Modules I, II, III, Research for Better Schools, Philadelphia, Pennsylvania, 1975

Hoetker, James, et al, Systems, Systems Approaches, and the Teacher, National Council of Teachers of English, Urbana, Illinois, 61801, 1972.

Jacobs, T. I., Leadership and Exchange in Formal Organizations, Hum RRO, Alexandria, Virginia, 1971.

Kaufman, Roger, Educational System Planning, Prentice Hall, Englewood Cliffs, New Jersey, 1975.

Lippitt, Gordon L., Organizational Renewal, Appleton-Century-Crofts, New York, New York, 1969.

Pack, Kenneth, Comprehensive Planning in Education, State of New Jersey, Dept. of Education, Trenton, New Jersey, 08625, 1974.

Research for Better Schools, Handbook of Comprehensive Planning in Schools, Educational Technology Publications, Inc., Englewood Cliffs, New Jersey, 1975.

Sarason, Seymour B., The Culture of the School and the Problem of Change, Allyn and Bacon, Inc., Boston, Massachusetts, 1971.

Schmuck, Richard A., et al, Handbook of Organizational Development in Schools, Mayfield Publishing Co., Palo Alto, California, 1972.

Schmuck, Richard A., Miles, Matthew B., Organizational Development in Schools, National Press Books, Palo Alto, California, 1971.

Temkin, Sanford, Handbook of Comprehensive Planning in Schools, Educational Technology Publications, Englewood Cliffs, New Jersey, 1975.

Watson, Goodwin, editor, Change in School Systems, National Training Laboratories, NEA, Washington, D. C., 20036, 1967.

Watson, Goodwin, editor, Concepts for Social Change, National Training Laboratories, NEA, Washington, D. C., 20036, 1969.

CHAPTER 4:

COMMUNITY INVOLVEMENT IN LONG RANGE PLANNING

COMMUNITY INVOLVEMENT IN LONG RANGE PLANNING

Community involvement is one of the most important concerns in long range planning for school districts, as schools exist for the purpose of meeting students' educational needs.

Community involvement is a means of gathering input before the school staff makes educational decisions. The ultimate outcome of citizen participation in the preparation of a long range plan should be an improved method of two-way communication between the community served and the school district.

Community involvement is an outcome of the premise that schools are of the people and to serve the people. They do not exist to perpetuate our present educational procedures indefinitely.

THE PUBLIC AS A PARTNER

According to a recent survey only five percent of school districts in the United States have had no experience with citizen's advisory committees. There is a growing realization that the more help received in decision-making from the public, the more effective school administration will be. Contact with citizens is not alien, the citizen's advisory committee merely formalizes the relationship school administrators have enjoyed on an ongoing basis with parents, volunteers, and persons making inquiries of the school.

The advantages of citizen's advisory committees are many. They include the following points:

a. The citizen's advisory committee constitutes a two-way channel, to and from citizens.

b. The citizen's advisory committee's role is that of an input filter and communicator.

c. Citizen's advisory committees also provide a broad basis of interest in school programs and assist a district in its overall public relations program, especailly through the mass media.

d. They build humanism for a school district by creating demonstrated concern for the individuals the district serves. Citizen involvement also creates more support for educational programs and establishes credibility for a school district as citizens have more credence than the professional educator in communicating with other citizens. Through committee participation, members learn many of the constraints under which educators must operate, as well as becoming conversant with the districts' programs and needs.

e. The advisory committee is also a listening post and can assist a district in solving problems by alerting staff to needs and concerns far earlier than they may otherwise be aware of them.

f. Citizen's advisory committees can be effective lobbies in the State Education Department and the State Legislature.

g. Citizen's advisory committee members can give you the extra help you cannot afford for your schools by working through many problems at varied levels among themselves. Volunteerism is often encouraged by citizen's advisory committees.

h. Citizen's advisory committees establish a cross flow through the community enabling persons who do not often talk to each other to communicate, thus creating more of a picture of a single community.

Building and district Parent Teacher Associations are not citizen's advisory committees, but it is important to let the Parent Teacher Associations know they can be involved if they so desire.

Saying "no" to an advisory committee can be a problem. If you find yourself saying "no" to them all the time, you are out of tune with the educational needs of the community. On the other hand, not every need identified by the committee must be acted on. Many times taking the

information into consideration is the most appropriate course. Feasible suggestions should be acted upon and the committee provided with feedback. Acting upon those ideas which are reasonable and meaningful will establish the needed trust for making the citizen's advisory committee a viable entity. At other times it will be necessary to explain the reasoning for making a particular decision and then simply letting the matter rest.

HOW TO GET STARTED

The selection process can begin by reviewing pages one through four of the Administrator's Manual, Educational Goals and Objectives: A Model Program For Community and Professional Involvement, published by Phi Delat Kappa. A detailed discussion of random selection methods, volunteer selection procedures, the various combinations thereof and advantages and disadvantages of selection methods for citizen involvement is covered on these pages. Citizen's Advisory Committees published by the National School Public Relations Association provides numerous examples of citizen's advisory committee membership selection approaches on pages ten through fourteen. One approach not mentioned in either reference is to call upon a number of people representing the major power groups served by the district. Using the assistance of this mini-committee, a selection process for the overall advisory committee can be decided upon.

Membership for the overall committee should probably not exceed twenty-five individuals. There will be ample opportunity for sub-committees to work involving ad hoc task forces and as many people as wish to participate. Selection of the chairman depends upon the organizational climate and political milieu in each school district. The

chairman may be a member of the school board, a member of the advisory group, the superintendent of schools, or a member of the professional staff in the school district. Co-chairman arrangements can also be used.

A committee life of two years with staggered succession for new members is the most efficient approach. Succession of membership should be build into the citizen's advisory committee's bylaws.

It is essential that the advisory committee be representative. Groups left outside, whether dominate or not, only create problems. When included in the involvement process, those against the school begin to learn the constraints the educators are under and the facts which inveigh against some of their anguish. Once such individuals are part of a formal advisory committee, they also become insiders and their posture for attack is weakened. If a person is unreasonable, overly critical, or irrational, the members of the committee will see this for themselves. As a professional educator, the best approach is to be open with all members of the committee. To involve a particularly vocal group it is wise to select one of the lieutenants rather than the leader of the group.

All members of a citizen's advisory committee must have the school board formally appoint them. This gives the work of the committee the status of an official district function.

Sample bylaws and other procedural documents for citizen's advisory committee use are contained in Citizen's Advisory Committees on pages forty-seven to fifty-six.

WHAT DO THEY DO AND HOW DO THEY DO IT

It is wise to include some initial training session for citizen's advisory committees. A retreat or intensive workshops held in a school building with provision of material and human resources will assist citizens in processing information much more effectively and in participating meaningfully in the advisory committee. Page thirty-one of Citizen's Advisory Committees further discusses training of personnel in community involvement.

Citizen's advisory committees have been involved in many activities over the years. Initially, advisement on matters of vocational education was the focus. This evolved quickly into assisting school districts in running financial compaigns for operating levies and building programs. Other activities which advisory committees might address themselves to are: naming schools, providing speakers bureaus, reviewing school property, running volunteer programs, training board members, serving as ombudsmen for complaints, securing scholarships, providing input for federal programs, selecting administrators and other school staff, establishing bus routes, studying special hazards, examining behavior codes and disciplinary policy, studying sex education programs and drug problems, participating in curriculum update, advising on school boundaries and closing of school districts, working in human relations programs, advising on special education, communications needs, needs assessment, goal development, and in textbook selection policy and review.

Defining tasks of citizen's advisory committees is a joint responsibility. The professional educator has a responsibility to assign realistic tasks which the committee members can achieve and which will

have meaning to them. There should be ample opportunity for committee members to define matters they wish to work upon as well. District plans should be revealed early to participants in the committee and to the public at large. It is far better to invite the public to study and plan proposals with you than to present them to them as a *fait accompli* and find that no relevance is seen by the public.

Every effort should be made to use clear language in communicating as a matter of course in all duties as a school administrator. This is particularly important in communicating with the citizenry we serve. The average reading level in the United States at this time is ninth grade as measured by standardized tests. However, most persons read more comfortably two grades below this, at the seventh grade level. The Gunning Fog Index is one technique for measuring the reading level of written material. Application for this technique to handouts provided to school district's publics will increase communication effectiveness.

Among the problems encountered in running citizen's advisory committees effectively, is apathy. Some approaches to combat this are discussed on page twenty-five of Citizen's Advisory Committees. Deadlines are important to keep work moving ahead. The overall committee should meet several times during the year on a formal basis, but monthly working meetings are important for sub-committees to maintain interest. *Ad hoc* sub-committees of the citizen's advisory committee, school building committees, and special purpose committees for issue oriented purposes meet more often than the umbrella advisory committees. It may be difficult for members to keep the big picture and long range objectives in mind. Sub-committees help combat apathy. Reports should be presented

at formal board meetings and media should cover activities of the committee wherever appropriate.

Secretarial assistance, freeing of the school person in charge of liaison with the advisory committee, and other logistical concerns are also essential to the success of any citizen's advisory committee.

Several models of citizen's advisory committees are included in the minutes of the Capital Area Intermediate Unit, Long Range Planning/ Educational Quality Assessment Workshop #3: "Community Involvement in Long Range Planning Processes," available on microfiche from Research and Information Services for Education in King of Prussia, Pennsylvania. Additional models are discussed in detail in the references indicated at the end of this chapter.

Some districts have a Superintendent's Advisory Committee serving as an umbrella group to provide two way communication between the public, the superintendent, and the schools regarding all aspects of the school program and its support. Such a group can prevent problems from being overmagnified and in many cases head off problems before they jell by planning ahead to counteract anticipated needs. This type of committee can become the vehicle for long range planning. Districts having specific ad hoc citizen's advisory committees such as Title I, Right to Read, or Vocational Technical, may wish to draw from several of these groups to form a nucleus or steering committee for long range planning.

A far reaching plan for citizen involvement in the schools has been unvertaken by the Mechanicsburg Area School District in Mechanicsburg, Pennsylvania. This district first formed a mini-planning committee consisting of the superintendent's management team, representatives throughout the district, teachers, middle managers, and so forth to

define a systems approach for community involvement. All publics served by the Mechanicsburg Area School District were designated including bus monitors, parents, students, tax payers, patrons, business people, recreation board, Parent Teacher Organization, municipal leaders, etc. Imagine a pebble hitting a pool. It starts concentric ripples. The Mechanicsburg Area School District community involvement model works in the same manner. The Superintendent and his management team are in the center. Outlying ripples consist of middle management, teachers, support staff, various groups representing layers of public depending upon how far removed they are from the services of the school. Each of these groups selects its own representative to a central planning council. It is this group which forms the steering committee for the long range planning effort.

WHO'S IN CHARGE HERE

Role definition of the advisory committee is essential, as well as clarification to the school staff, that the superintendent ultimately supports them. At all times, the advisory role of the committee must be stressed. The board and the superintendent have the ultimate decision-making responsibility. Time will build the necessary trust and rapport to enable the citizen's advisory committee to be an effective part of the planning and decision making process in a school district.

COMMUNITY INVOLVEMENT IN LONG RANGE PLANNING: SPECIFIC REFERENCES

Davies, Don. Citizen Participation in Education - Annotated Bibliography, Institute for Responsive Education, 70 Sacham Street, New Haven, Conn. 06520, 1974.

Holliday, Albert and Goble, Nicholas. "How To Make A Citizen's Committee Work," Pennsylvania Education, July-August, 1972, p. 6-7.

Miller, Leann R., Citizen Advisory Committees, Pennsylvania Department of Education, 1975.

National Education Association, Making Schools Work - Resource Guide for Town Meetings and Other 70's Action Programs, N.E.A., Washington, D. C., 1972.

Partridge, Ronald R. "Community Participation in Curriculum Projects," Curriculum Trends, Croft Educational Services, Inc., March 1971.

Phillips, John D. "A Survey Can Increase School-Community Interaction," Pennsylvania Education,July-August, 1972, p. 8-10.

Rose, B. Keith, et. al., Administrators Manuel, Educational Goals and Objectives: A Model Program For Community and Professional Involvement, Phi Delta Kappa, Inc., Bloomington, Indiana, 1972.

Small, Arthur A., Jr. "Community Relations and Educational Innovation," Westinghouse Learning Corporation Monograph, Vol. 111, No. 1, Iowa City, Iowa.

_____, Citizens Advisory Committees: Public Participation Increase; Guides Change in American Education, National School Public Relations Association, Arlington, Virginia, 1973.

_____, Helpful Hints: How To Conduct a Community Action Meeting, Continuing Education, Division of University Extension, University of Delaware, Newark, Delaware, 1971.

CHAPTER 5:

COMMUNICATING EDUCATIONAL QUALITY ASSESSMENT AND OTHER NEEDS ASSESSMENT RESULTS TO THE PUBLICS A SCHOOL SERVES

COMMUNICATING EDUCATIONAL QUALITY ASSESSMENT AND OTHER NEEDS ASSESSMENT RESULTS TO THE PUBLICS A SCHOOL SERVES

Communication is the art, the science, and the process of transferring an idea from one mind to another. Public relations is planned, two way, systematic communication. In communicating the results of needs assessments such as Educational Quality Assessment to the publics a school serves, the school administrator should consider basic public relations techniques. The application of such techniques to the release of test data is the focus of this chapter.

PROS AND CONS: RELEASE OF TEST DATA

The release of test results has positive and negative aspects. Reasons for releasing test results include:

The public has a right to know.

Educational accountability is especially important in these times of taxpayer austerity and public skepticism.

Although districts may be reluctant to share test results, it is much more productive to be open and responsive to the persons we serve as an institution in our democratic society.

Release of test results can help free up funds by bringing the public along with the schools in the identification of needs.

The absence of information such as that contained in test results may lead to rumor and misunderstanding.

Test result information is of value in planning both short and long range program needs.

Ultimately, the release of test results leads to programs better suited to the needs of the students the school serves.

Reasons for not releasing test results include:

Achievement test data may be invalid.

The possibility exists for misinterpretation of results by the public and/or the press.

Pressure to have high scores can lead to teaching tests in the classroom.

Comparison may be made among districts, teachers, or school buildings. Such comparisons often lack validity.

Measures in the effective domain are often restricted to nominal and ordinal devices.

Real estate can be affected in districts scoring poorly.

Test results can be misused by politicians, militant groups, and the like for their own purposes.

Constitutional rights may be violated by some release procedures.

The self-concept of the school community and staff morale can be affected by release of results.

Staff time and budget is needed to prepare test results in a form suitable for release.

GUIDELINES FOR RELEASE

The Educational Quality Assessment program in use in Pennsylvania is of specific interest as it provides baseline needs assessment data on the Pennsylvania Long Range Plan. District and school comparisons cannot be drawn from the results of Educational Quality Assessment. Concurrent publicity and post-assessment publicity including the actual release of results, how to communicate negative results and ways to interpret a mass of information in a way that the public can understand are discussed at length in

Educational Quality Assessment Publicity Suggestions, published by the Pennsylvania Department of Education in 1974.

In releasing any needs assessment results, it is best to admit weaknesses and to include programs for improvement in areas of need as part of the release. If a district anticipated a weakness, it is advisible to indicate that this weakness was expected in the release of results. It may be appropriate to indicate that previous requests for personnel, buildings, and materials had been turned down by public referendum. In regard to the information overload problem, do not obscure information, but avoid being so specific that the release is not understandable. Making test information as simple as possible and using only one method of comparison is best. For example, percent or grade level, or stanine might be used in a consistent approach but not in combination. Charts can show the interrelation with norms or prediction bands or other measures to illustrate the results being presented. Suggested changes in program are appropriately presented on charts as well.

A survey recently completed by the Educational Research Service indicates that grade equivalent and percentile are the most popular means of reporting test scores. Grade equivalent only is the next most popular; followed by percentile only. A survey released by Nation's School in 1972 indicated that fifty-one percent of the superintendents surveyed preferred grade equivalents for explanation in understandable fashion to their publics. Forty-two percent of responding superintendents felt that percentile based on national norms were best.

Factors which influence test results should also be included in the consideration of program development and interpretation of results to the

public. It is essential that school comparison charts be avoided and that the staff understands and can interpret test results. All the staff in a school should be briefed, especially teachers and administrators. Sample portions of the tests can be administered through reporters, teachers to whom the scores are being explained, or parents in order to provide a better frame of reference in interpreting the results.

It should be emphasized that test results should be used as management information for improvement of the school system. This positive emphasis will be credible to the internal and external publics a school serves.

In publicizing Educational Quality Assessment and other needs assessment results, a chart indicating in three columns, "who," "what," and "by when" may be helpful in planning the release of data in insuring that the follow-up indicated in the various releases actually takes place. This chart becomes a set of target dates for implementation of various follow-up programming indicated by the test results themselves.

In summary, in publicising Educational Quality Assessment and similar test results, consideration should be given to the following:

Present district results in summary form.

Use a nonstatistical approach (for example, stanine predicted band, or quintile, or narrative, and be consistent in the approach selected for publicizing the results).

Include prioritization information as a frame of reference for interpreting local results in terms of local needs.

Relate the results to the educational program--both ongoing and planned.

Apply the results to local needs and include intervention strategies.

Personally meet with the press and provide hand-outs to assist in accurate release of data.

EXAMPLES OF EDUCATIONAL QUALITY ASSESSMENT COMMUNICATIONS

Pennsylvania has been collecting sample communication releases on Educational Quality Assessment. This information is being coded and these samples are available for inspection in the Pennsylvania Department of Education. School districts have been surveyed regarding the groups they release results to including: school board, administrators, teachers, service clubs, parent organizations, students, news media, and others. Methods of communication surveyed include: curriculum bulletin, faculty memorandum, newsletter, special written report, press release, in-service presentation, special media such as slide-tape programs, and speakers' bureaus. To date, most of the communication methods have been written. Some innovative approaches have been developed using audio-visuals including slide-tape presentations. A retreat approach enabling administrators and teachers to study in depth the results received for their district and to plan publicity strategies and intervention techniques for the educational program has also been used successfully.

The following information pertains specifically to the release of Educational Quality Assessment data:

1. There are too many data to release all of the school reports.
2. Statistical notions are frequently not understood or are misunderstood by the public.
3. The public can accept low scores if they know the school administration is aware of the situation and planning programs on that basis.

4. Any press release should contain information relative to the Educational Quality Assessment program, the Ten Goals of Quality Education, the condition variable rationale, and the anonymous nature of the student responses and teacher questionnaires.

5. Data on goal scores might be released by school using:
   a. Deciles or quartiles,
   b. Above, within, or below predicted range,
   c. Above the state mean or above the state mean and fiftieth percentile,
   d. Percentile prediction band and obtained percentile range,
   e. Percent of students passing or having a favorable attitude compared with state figures, or
   f. A comparison of goal percentiles with each other. (For example, our lowest scores were in the area of self-esteem and citizenship while our highest were in understanding others and basic skills.)

6. Multi-school releases might:
   a. Indicate weak (strong) goal scores common to all schools;
   b. Indicate deciles or quartiles for each goal and each school, perhaps without naming the school;
   c. Indicate range of percentiles for each goal for the entire set of schools;
   d. Find the numerical school district mean for all schools reporting the same grade level and compare each school to this mean.

7. Both the "good news" and the "bad news" should be addressed.

8. Certain condition variable data might be included in the release such as percent attendance, amount spent per student, parental attitude toward school, and staff preparation.

9. Timing is important. A recommended sequence might be to release first to the school board, then to the faculty, then to the students, and then to the public and neighboring districts.

10. Include the way in which students and faculty rank the educational goals (prioritization) in release data. Chapter VII: "Where We Want To Be: Prioritizing District Goals" discusses this ranking procedure in detail.

COMMUNICATING NEEDS ASSESSMENT RESULTS: SELECTED REFERENCES

Bettinghaus, Erwin P. and Miller, Gerald R., Keeping the Public Informed: Accent on Accountability, Cooperative Accountability Project, Denver, Colorado, 1973.

Clemmer, Robert, et al, Indicators and Statewide Assessment, Cooperative Accountability Project, Denver, Colorado, 1974.

_____, "Communications: Putting It All Together," Thrust, Association of California School Administrators, Vol. 3, No. 1, October, 1973.

_____, Conference Time for Teachers and Parents, National School Public Relations Association, Arlington, Virginia, 1974.

_____, Educational Quality Assessment Manual 1 Teacher In-Service on the Educational Quality Assessment Status Report, Pennsylvania Department of Education, Harrisburg, Pennsylvania 1974.

_____, Educational Quality Assessment Manuals for Interpreting School Reports, Pennsylvania Department of Education, Harrisburg, Pennsylvania, 1974.

_____, Educational Quality Assessment Publicity Suggestions, Pennsylvania Department of Education, Harrisburg, Pennsylvania, 1974.

_____, Elementary School Public Relations Tool Kit, National Association of Elementary School Principals, Washington, D. C.

_____, Evaluation and Reporting of Student Achievement, National Education Association, Washington, D. C.

Hanson, Gordon, Accountability: A Bibliography, Cooperative Accountability Project, Denver, Colorado, 1973.

_____, Ideas for Improving Public Confidence in Public Education, National School Public Relations Association, Washington, D. C., 1972.

_____, Making School Communications Work for You, National School Public Relations Association, Arlington, Virginia, 1974.

Messing, Ruth E., "Communications and Public Relations In Teaching," Professional Report, Croft Publications, March, 1974.

Pharis, William L., et al, Bridging the Gap in Home-School Communications, National Association of Elementary School Principals, Washington, D. C.

_____, Putting Words and Pictures About Schools Into Print, National School Public Relations Association, Washington, D. C., 1972.

_____, School Volunteers, National School Public Relations Association, Washington, D. C.

_____, Working With Parents, National School Public Relations Association, Washington, D. C.

_____, Your Child From Home to School, National School Public Relations Association, Washington, D. C.

CHAPTER 6:

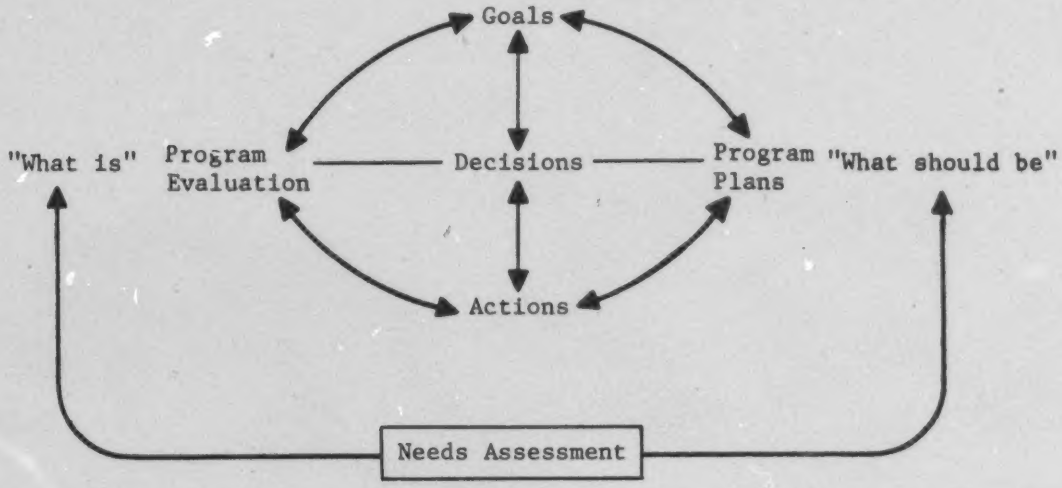
WHERE WE ARE:

NEEDS ASSESSMENT

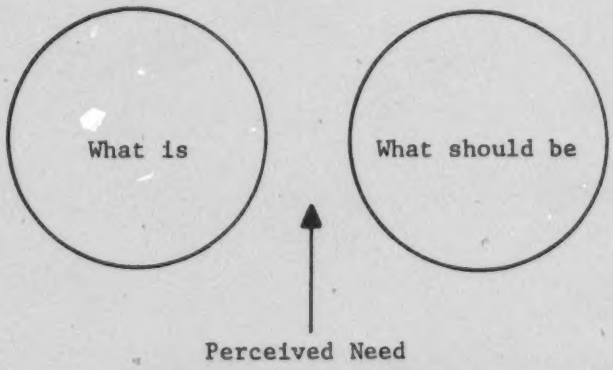
WHAT IT IS

Needs assessment is the first stage in educational evaluation. It preceeds program planning and implementation. During needs assessment, current operating problems are identified through a systematic examination of expressed educational needs. The needs identified represent the difference between an acceptable level of performance and perceived current performance. Program needs are then projected based upon anticipated changes in a school's resources, clients, and goals. An analysis of present needs is also derived from the needs assessment data. In the case of the Pennsylvania Long Range Plan, the Educational Quality Assessment provides baseline data for needs assessment. Additional measures may also be used. These include such things as district longitudinal standardized testing programs and the data gathered by methods discussed in this chapter and suggested by the references listed at the end of the chapter.

Needs assessment offers a means to streamline and increase the reliability of data gathering. However, the systems model alone cannot clarify the ends needed once the means have been defined. Tradition and "soft" evaluative measures must be considered to provide validity to the needs assessment program. Pupil reaction to various learning strategies, readiness factors, the on-going program in the district, and parental expectations are among such areas to be taken into account.



Needs assessment is an information generating tool. Needs assessment itself does not make decisions but provides guidance for educators to make decisions. The basic needs assessment discrepancy model compares "oughts" with "what is". Goals and objectives provide the "oughts". "What is" is determined through actual data gathering and data generation processes. Needs are indicated by the discrepancies or gaps between "ought" and "is". These two areas can overlap when no discrepancy exists.



NEEDS ASSESSMENT AND DISTRICT GOAL SETTING

Needs assessment is becoming an essential part of goal setting in the curriculum development process. Fenwick W. English and Roger A. Kaufman[4] have explored this aspect of needs assessment as it relates to the educational partners of learners, educators, and persons in the community. A brief summary of steps needed to effectuate community based needs assessment and goal setting is outlined below.

1. Determine indices of validity for the objectives.

   These indices are the needs which confirm decisions later. They provide criteria for present and future educational programming.

2. Derive goals

   Validation and prioritization can be accomplished using commercially available kits designed for this purpose. The three constituencies--pupils, teachers, and community--should be involved. Use the kits rather than spending time writing goals and validations. These kits can be adapted to a district's characteristics. Representative sampling of opinions is one of the biggest problems in needs assessment.

3. Validate goals

   Goals can be validated using face or concurrent validity. Validity can be used by preparing the mean from the constituency served--staff, kids, community. The mean will indicate the goals while reflecting input from everyone surveyed. It is more reliable than the mode or median for this purpose. Such

---

4 English, Fenwick W. and Kaufman, Roger A., Needs Assessment: A Focus for Curriculum Development, ASCD, Washington, D.C., 1975, pp. 12-32.

needs assessment is a great leveler for school-community dialog.

4. Ranking of goals, prioritization

Goals are presently ranked implicitly in terms of dollar allocations for time, people, and resources in schools. Input about how it "should be" is essential. Some of the present allocations are unimportant. What we are doing may not concur with the prioritization determined above in the goal validation phase. Default, pressure groups, and tradition may all account for what exists now. A Q-sort can be used and coded by groups as to the various levels of professional staff, community, and students involved in the input. (See page 66 for detailed explanation.) The same thing may be accomplished with a mailed attitude questionnaire.

5. Publish this material as a board report.

6. Translate goals into performance objectives in two steps.

a. Terminal objectives or performance indicators define all parts of the goal. That is, they are measures of acquired skills and attitudes or end products. Each performance indicator should have a performance objective. Use Bloom's taxonomy as a forcing function to guide writers through the learning domains. The taxonomy should be applied after the writing of indicators because the domains are not inherently separate. Then, rerank the goals in the first draft of performance objectives to allow for preferences among domains.

Do the needs assessment out of subject disciplines rather than by individual subject area. Otherwise needs assessment becomes a self-validation tool to keep a subject in the curriculum and to

challenge the efficacy of all other subject areas.

b. Develop performance objectives for each performance indicator. This two step process can simplify the transition from broad goal statements to time specific statements of behaviors and attitudes expected of learners.

For those who wish, these translations may be made in one, rather than two, steps.

7. Validate performance objectives

Sample students, staff, community, and ask them whether the objectives as drafted are what was intended. React to what "ought to be" as defined in steps one and two. This is also essential to needs assessment. Needs assessment is not a ceiling but a minimum. The Delphi Process developed by the Rand Corporation for forecasting may be used. Round one will give twenty-five percent accuracy of prediction. This increases between two rounds. Take the results, look at the goals, and ask how to equip students to deal with these things. Have citizens read Future Shock and discuss it and then react to the district goals. Feedback regarding change in the goals of curriculum as values shift in a district is important. The validity of goals and objectives is the most important thing.

The goals developed should be overlaid across the current curriculum patterns. Often we find we are not teaching what the schools say we should be. Most curriculum is in the teacher's head anyway. Make a list of the needs, rank the goals as a guide to these needs, and then work to close the gap. Enumerate by goal what needs to be done for the entire list. One hundred percent level achievement is assumed unless otherwise stated.

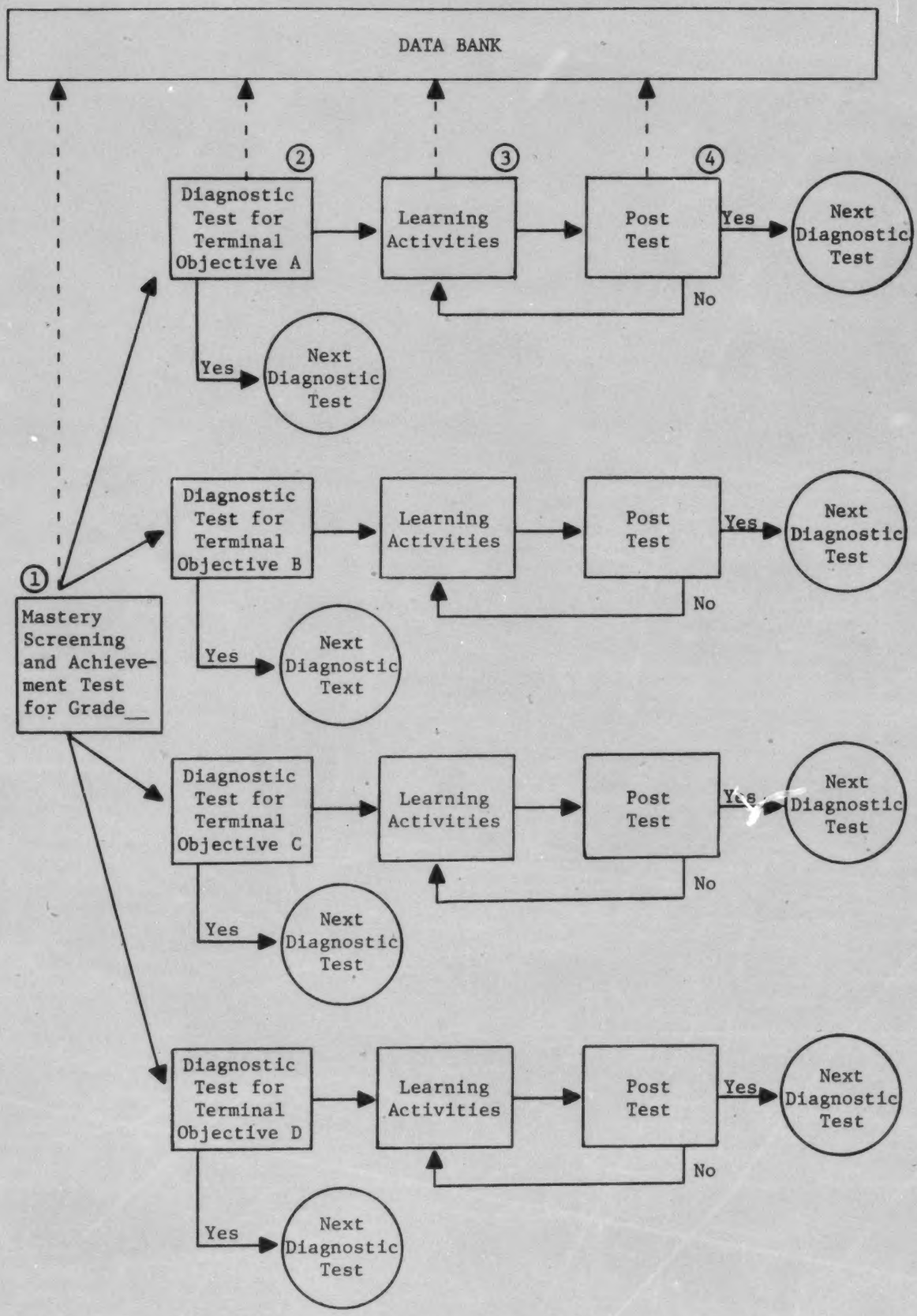
A phone survey of eight to ten items can be used to determine goals and needs in the community. Allow one year for determining "what" and one year for determining "how". The community should be involved in the "what" and hold educators accountable to close the gap between "what" and "how". They should not tell educators "how". Political systems in operation locally must be taken into account by educators in making their needs assessment plan.

8. Publish goal statements

Involvement is essential to carrying out the program once these priorities are identified. Needs assessment only identifies "what" not "why". Once areas in need of change have been identified for each goal, this information should be shared with the schools' publics along with the strategies for bringing achievement into line with the prioritized goals. The empirical change process can identify further what is needed. Post-diagnostic sessions with professionals can determine where to alter programs.

NEEDS ASSESSMENT BASED UPON LEARNER NEEDS

Educators tend to gather group data regarding student needs when they are trying to determine individual data for individualizing instruction and personalizing learning. Testing most often is norm-referenced. That is, students are compared to other groups of students, or one student with another. To analyze individual learner needs, criterion referenced testing is necessary. This form of evaluation pinpoints areas where mastery of an objective has been obtained. A model for screening mastery of various criterion for individual students follows.


DATA BANK
1
Mastery Screening and Achievement Test for Grade__
2
Diagnostic Test for Terminal Objective A
3
Learning Activities
4
Post Test
Yes
Next Diagnostic Test
No
Yes
Next Diagnostic Test
Diagnostic Test for Terminal Objective B
Learning Activities
Post Test
Yes
Next Diagnostic Test
No
Yes
Next Diagnostic Text
Diagnostic Test for Terminal Objective C
Learning Activities
Post Test
Yes
Next Diagnostic Test
No
Yes
Next Diagnostic Test
Diagnostic Test for Terminal Objective D
Learning Activities
Post Test
Yes
Next Diagnostic Test
No
Yes
Next Diagnostic Test

Pupil needs assessment testing should be done at the beginning of the year. A mastery reading test of twenty objectives, considered to be important or terminal might have three items for each terminal objective. Such a test limits conclusions, while a greater number of items per objective would provide a finer testing screen. Aggregate data for decision-makers, such as a teacher, can be gathered from a small number of items for each objective. Thus the teacher is provided with a screening device for each individual student. In depth testing can be done in those areas of apparent weakness to pinpoint specific problems and appropriate instructional interventions can be developed by the teacher. There should also be post-testing to parallel the diagnosis of pre-test items.

NEEDS ASSESSMENT IN AFFECTIVE AREAS

Attitudinal testing, such as attitude toward school and learning, or self-concept items must be administered with care. Existing attitude scales measure large changes, not incremental changes. The latter may be seen more readily in content area testing. The embodied value-structure in an attitude scale is something people are sensitive to. By simply measuring, you are impacting change upon the attitude. Attitude testing can be helpful in assisting a learner to define his own views in a particular area such as making a career decision. Criterion referenced testing reveals the presence or absence of a decision-making process, while attitude questionnaire might consist of items having three or five choices on a Likert intensity scale for high school students, or smiling and frowning faces for younger pupils to respond to. Sample items might be, "I would rather go to school than stay home, " "school helps me be a better person," "I sometimes feel I just can't learn," "going to school is a

waste of time." To each, a student might respond "true", "not sure", or "false".

A standardized test is most useful when referenced to the state or district curriculum guides. The test can be reconfigured using the district or state objectives as the criteria for item inclusion. Results are then meaningful in terms of a district's specific goals, terminal objectives, and enabling objectives pursued by the teacher and students in the classroom. Many districts are developing their own criterion referenced tests while others are utilizing various testing services to adapt standardized tests to district goals and objectives.

The following guidelines for planning needs assessment are readily adaptable to school district planning for needs assessment, building needs assessment, or needs assessment indicated by the classroom teacher.

Some guidelines in planning and maintaining the system include:

- Involve those who are being assessed, beginning with the planning stages of the system.
- Capitalize upon the capabilities and interests of those individuals in designing and maintaining the system.
- Make sure that the purposes and intended uses of the system are clear to all concerned.
- Help those involved in understand the importance of the system as it applies to them personally.
- Maintain an active program of study on aims and methods of assessment/evaluation.
- Provide adequate time to carry out the program of assessment/evaluation.
- Utilize as many different types of evidence as are necessary to help insure accurate, comprehensive assessment.
- Provide ongoing feedback to those being assessed/evaluated.

- Obtain ongoing feedback about the effectiveness of the system and make desired changes as necessary.

Two fundamental concerns for any data collection system are:

- the relevance (validity) of the data to what is being assessed/evaluated
- the accuracy (reliability) of the data collected.[5]

Needs assessment observations of an unobtrusive nature are particularly helpful in measuring in the affective domain. Guidelines for unobtrusive observations include the considerations which follow:

The behaviors to be observed should be

- clearly defined, with concrete examples provided
- observed in as realistic a setting as possible
- observed over a period of time under the variety of conditions in which they might be manifested
- observed by the persons who are in the best position to see them manifested
- specific enough to make them readily comprehensible and mutually exclusive to other behaviors
- recorded immediately after they are observed
- recorded and scored accurately and in as unbiased a manner as possible

Qualifications for observers include

- an interest in the observation process and the ways in which they can improve their observation skills
- a willingness to receive assistance and training as necessary

---

5 Humphry, Betty and McAloon, Ann, "Data Collection Processes and Techniques for In-Service Teacher Assessment/Evaluation," Educational Testing Services, Princeton, New Jersey, March, 1973, p. 3.

- sufficient knowledge of the kind of behavior to be observed
- the ability to perceive and abstract specific behaviors from a larger pool of behaviors
- the capacity to maintain objectivity and to put aside personal likes and dislikes
- awareness of the care and attention that are necessary to arrive at accurate, useful observations, including willingness to have ratings checked against those of other observers[6]

A variety of rating scales, including numeric, graphic, standard scale, accumulated point scale, and forced choice scale, as well as interview and questionnaire techniques, guidelines for conducting data through other means such as visits and conferences, professional records, attendance records, structured and unstructured feedback from peers, and structured and unstructured self-evaluation may be used by school districts as valid needs assessment techniques. These methods are of particular value in annotating needs in the affective domain.

---

6 Ibid., p. 5.

WHERE WE ARE: NEEDS ASSESSMENT: SELECTED REFERENCES

The resources listed below will be useful to districts wishing to further develop the concept of needs assessment. References preceded by an "A" refer specifically to the affective domain.

Alkin, Marvin C., et al, Evaluation and Decision Making: The Title VII Experience, Center for the Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California, 1974.

"A" Barkan, Manuel, et al, Guidelines for Curriculum Development for Aesthetic Education, Cemrel, Inc., The Ohio State University, 1970, (See "Criteria for Evaluation Courses and Programs," pp. 61-63, and "Guidelines for Evaluating Effects of Curriculum Plans on Classroom Events," pp. 64-69.)

Bloom, Benjamin S., Handbook on Formative and Summative Evaluation of Student Learning, McGraw-Hill Book Company, New York, New York, 1971.

Carithers, Polly, How To Conduct Low Cost Surveys, National School Public Relations Association, Washington, D. C.

"A" Castillo, Gloria A., Left-Handed Teaching: Lessons in Affective Education, Prayer, Publishers, New York, New York, 1974.

"A" CEMREL, Toward an Aesthetic Education, MENC, Washington, D. C., 1971, (See "Evaluation and Curriculum Development in the Arts," pp. 117-128).

Clemmer, Robert, et al, Indicators and Statewide Assessment, Cooperative Accountability Project, Denver, Colorado, 1974.

Coleman, James S. and Karweit, Nancy L., Information Systems and Performance Measures in Schools, Educational Technology Publications, Englewood Cliffs, New Jersey, 1971.

Combs, Arthur W., Educational Accountability, ASCD, Washington, D. C., 1972.

"A" Fox, Robert S., et al, Diagnosing Professional Climate of Schools, NTL Learning Resources Corporation, Fairfax, Virginia, 1973.

Hanson, Gordon, Accountability: A Bibliography, Cooperative Accountability Project, Denver, Colorado, 1973.

Harris, Chester W., et al, Problems in Criterion-Referenced Measurement, Center for the Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California, 1974.

"A" Hively, Wells, et al, Domain-Referenced Curriculum Evaluation: A Technical Handbook and a Case Study From the Minnemost Project, Center for the Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California, 1973.

"A" Hoepfner, Ralph, et al, Test Evaluations: Test of Higher-Order Cognitive, Affective, and Interpersonal Skills, Center for the Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California, 1972.

Hoepfner, Ralph, et al, Preschool/Kindergarten Test Evaluations, Center for the Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California, 1971.

Hoepfner, Ralph, et al, Elementary School Test Evaluations, Center for the Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California, 1970.

Hoepfner, Ralph, et al, Secondary School Test Evaluations: Grades 9, and 10, Edited and prepared by the Center for the Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California, 1974.

Hoepfner, Ralph, et al, Secondary School Test Evaluations: Grades 11 and 12, Center for the Study of Evaluation, UCLA Graduate School of Education, Los Angeles, California, 1974.

Humphry, Betty J., McAloon, Ann, ed., New Trends in Evaluation, Educational Horizons, Summer 1974, Vol. 52, No. 4.

Kaplan, Bernard A., et al, Needs Assessment in Education, New Jersey Department of Education, Trenton, New Jersey, 1974.

"A" Krathwohl, David R., et al, Taxonomy of Education Objectives, Handbook 2: Affective Domain, David McKay Company, Inc., New York, New York, 1956.

Lessinger, Leon, Every Kid A Winner: Accountability in Education, Simon and Schuster, New York, New York, 1970.

Lessinger, Leon M. and Tyler, Ralph W., Accountability in Education, Charles A. Jones Publishing Company, Worthington, Ohio, 1971.

Lipsitz, Lawrence, et al, "Accountability in Education," Educational Technology

"A" Mager, Robert F., Developing Attitude Toward Learning, Fearon Publishers, Belmont, California, 1968 (see "How Will I Know When I've Arrived," pp. 67-98.).

"A" Pfeiffer, J. W. and Jones, J. E., A Handbook of Structured Experiences for Human Relations Training, Volumes I, II, and III, University Associates Press, Iowa City, Iowa, 1971.

Popham, W. James, ed., Criterion-Referenced Measurement, Educational Technology Publications, Englewood Cliffs, New Jersey, 1971.

Pundiak, Jean, Bernard, Betsy, and Brizins, Martine, Needs Assessment in Education, State of New Jersey, Department of Education, Trenton, New Jersey, 1974.

"A" Quality Education Program Study, Booklet 1-A Needs Assessment, Self Understanding, Pennsylvania Goal One, ESEA Title III, Bucks County Public Schools and Pennsylvania Department of Education, 1971.

"A" Quality Education Program Study, Booklet 2-A, Needs Assessment, Understanding Others, Pennsylvania Goal Two, ESEA Title III, Bucks County Public Schools and Pennsylvania Department of Education, 1971.

Quality Education Program Study, Booklet 3-A, Needs Assessment, Basic Skills, Pennsylvania Goal Three, ESEA Title III, Bucks County Public Schools and Pennsylvania Department of Education, 1971.

"A" Quality Education Program Study, Booklet 4-A, Needs Assessment, Interest in School and Learning, Pennsylvania Goal Four, ESEA Title III, Bucks County Public Schools and Pennsylvania Department of Education, 1971.

"A" Quality Education Program Study, Booklet 5-A, Needs Assessment,Interest in School and Learning, Pennsylvania Goal Five, ESEA Title III, Bucks County Public Schools and Pennsylvania Department of Education, 1971.

Quality Education Program Study, Booklet 6-A, Needs Assessment, Good Health Habits, Pennsylvania Goal Six, ESEA Title III, Bucks County Public Schools and Pennsylvania Department of Education, 1971.

"A" Quality Education Program Study, Booklet 7-A, Needs Assessment, Creativity, Pennsylvania Goal Seven, ESEA Title III, Bucks County Public Schools and Pennsylvania Department of Education, 1971.

Quality Education Program Study, Booklet 8-A, Needs Assessment, Vocational Development, Pennsylvania Goal Eight, ESEA Title III, Bucks County Public Schools and Pennsylvania Department of Education, 1971.

"A" Quality Education Program Study, Booklet 9-A, Needs Assessment, Understanding Human Accomplishment, Pennsylvania Goal Nine, ESEA Title III, Bucks County Public Schools and Pennsylvania Department of Education, 1971.

"A" Quality Education Program Study, Booklet 10-A, Needs Assessment, Preparing For A Changing World, Pennsylvania Goal Ten, ESEA Title III, Bucks County Public Schools and Pennsylvania Department of Education, 1971.

"A" Raths, Louis E., et al, Values and Teaching, Charles E. Merrill, Columbus, Ohio, 1966.

"A" Read, Donald A. and Simon, Sidney B., Humanistic Education Sourcebook, Prentice-Hall, Inc., Englewood Cliffs, New Jersey, 1975.

Ribble, Susan Ketchum, State Goals for Elementary and Secondary Education, Cooperative Accountability Project, Denver, Colorado, 1973.

Roberson, E. Wayne, Educational Accountability Through Evaluation, Educational Technology Publications, Englewood Cliffs, New Jersey, 1971.

"A" Schrank, Jeffrey, Teaching Human Beings: 101 Subversive Activities for the Classroom, Beaver Press, Boston, Massachusetts, 1972.

Selltiz, C. and Jahoda, M., et al, Research Methods in Social Relations, Holt, Rinehart and Winston, New York, New York, 1967.

"A" Simon, Sidney B., et al, Values Clarification, Hart Publishing Company, Inc., New York, New York, 1972.

Thomas, John H., et al, Polling and Survey Research, National School Public Relations Association, Washington, D. C.

Van Dalen, D. B., and Meyer, William J., Understanding Educational Research, McGraw-Hill, New York, New York, 1966.

Wilsey, Carl E. and Schroeder, Glenn B., Roles of the Participants in Educational Accountability, Cooperative Accountability Project, Denver, Colorado, 1974.

Womer, Frank M., Developing a Large Scale Assessment Program, Cooperative Accountability Project, Denver, Colorado. 1973.

"A" Worthington, Kent L., and Wight, Al, et al, Measurement of Affect and the Humanizing of Education, Volumes, I, II, III, IV, Interstate Educational Resource Service Center, Salt Lake City, Utah, 1974.

_____, New Trends in Evaluation, Educational Horizons. Bloomington, Indiana, Summer 1974, Vol. 52, No. 4.

CHAPTER 7:

WHERE WE WANT TO BE:

PRIORITIZING

DISTRICT GOALS

GOAL PRIORITIZATION AND NEEDS ASSESSMENT

Expectations and needs of the publics a school district serves provide the reality around which the educational program should be developed. A systems approach to long range planning begins with needs assessment, and moves next to the sorting of educational goals into priority order. This priority order becomes the planning base for instructional strategies which will responsively and realistically achieve the district goals by meeting the educational needs of its learners.

The prioritization of district goals may take many forms. It is appropriate to apply several types of prioritization processes to a districts' goals. Subtleties in wording and differences in first and second samplings can provide valuable feedback. Shifts in goal priorities over time and validation of the needs assessment process can be accomplished in this manner as goals are expected to fluctuate in importance depending upon the degree they are being met by the educational program at any given point. Formal and informal prioritization are available. English and Kaufmann[7] suggest a mailed survey or questionnaire, goal ranking with a Q-sort, and forecasting methods ranging from the Delphi Process to discussion groups and brainstorming sessions following the reading of such resources as Toffler's Future Shock, Leonard's Education and Ecstasy, and similar books can establish the same framework for discussion.

PRIORITIZATION AND EDUCATIONAL QUALITY ASSESSMENT

The prioritization processes which follow are based upon Educational Quality Assessment, the needs assessment device adopted by the Commonwealth

---

7 English, Fenwich W., and Kaufman, Roger A., Needs Assessment: A Focus for Curriculum Development, ASCD, Washington, D.C., 1975, pp. 33-34.

of Pennsylvania. Regardless of the prioritization process selected, the needs assessment is complete once prioritization of goals has taken place. The ranked goals and supporting data become criteria for evaluating future program performance. The prioritization techniques outlined for Educational Quality Assessment on the following pages can be adapted to other needs assessment measures.

Educational Quality Assessment includes two types of data reporting: condition variables from students and teachers, and goal scores from students. In addition, four types of scoring are available. These include: raw score, state-wide percentile, predicted score range, and criterion-referenced goal profiles.

RANKING GOALS ON THE SCHOOL STATUS REPORT

A numerical method of ranking goals contained in the report follows. Using a grid format for tally purposes, mark six columns left to right across the top of the grid and title them "A" through "F". Twelve columns, top to bottom on the grid, should be marked with the numbers for the Ten Goals of Quality Education including two subcategories each for Goal III and Goal VIII. The chart below may be used for this prioritization approach.

	A	B	C	D (A+B+C)	E	F
I						
II						
III-V						
III-M						
IV						
V						
VI						
VII						
VIII-A						
VIII-K						
IX						
X						

Calculate the numerical ranking of the goals presented in the school status report using the following steps:

a. Raw Score and Predicted Range

In Column A indicate for each goal six points if the raw score is above the predicted band, three points if the raw score is within the predicted band, and zero points if the raw score falls below the predicted band.

b. Statewide Percentile

In Column B indicate the statewide percentile for each goal on the school report rounded to the nearest tenth percent and divided by ten.

c. Criterion Referencing

Round the percent of school students passing the criterion level (one more than fifty percent of the items responded to in the affirmative) to the nearest tenth percent and divide by ten. For the cognitive goals (On the elementary reports this includes both portions of Goal III as well as Goal VI and Goal VIII-K. For the eighth and eleventh grades the cognitive areas are both portions of Goal III and Goal VIII-K. "X" equals the percent of local students in the two highest quintiles. If "Y" is less than "X", indicate eight points in Column C for the cognitive goals. Where "Y" equals "X", indicate five points in Column C, and where "Y" is greater than "X", indicate two points in Column C.

d. School Status Report Profile Rank of Goals

Add columns A, B, and C to obtain this value. Place the sum in Column D.

An additional priority profile of goals can be obtained from the school report by listing Goals I through X in twelve spaces

vertically on a page. The following chart suggests a format for this tabulation.

SCHOOL STATUS REPORT PRIORITY PROFILE RANK OF GOALS
(Data from Column D)

	Goal #
Highest Priority (Lowest Sum)	_____
	_____
	_____
	_____
	_____
	_____
	_____
	_____
	_____
	_____
Lowest Priority (Highest Sum)	_____

Indicate the number of each goal of Quality Education in rank order of priority using the value figures in Column D. The highest priority goals to work on as indicated by the school status report, are those at the top of the column. These are the goals having the lowest scores. The lowest priority goals of Quality Education as indicated by the school status report, are those appearing at the bottom of the column. These are the goals having the highest numerical score in Column D.

RANKING GOALS ON EDUCATIONAL PHILOSOPHY

e. Rank Based Upon Philosophy

Column E. introduces the idea or rank based upon educational philosophy. This can be accomplished in one of three ways:

1) Have individuals list the three most important goals and the three least important goals from among the Ten Goals of Quality Education. Indicate that the persons doing this ranking should put "the student" in front of each of the goal statements and ask themselves whether they believe each is a necessary ingredient of formal education. Zero points can be scored for each high

ranked goal (important), six points for each low ranked goal (least important), and three points for all other goals.

2) Individuals can complete the process outlined in #1 above by placing a value on each of the Ten Goals of Quality Education ranging on a scale of one for the most important to five for the least important. The mean value of value insights for all individuals responding is indicated in Column E.

Either of these methods can be accomplished with individual handouts or put on transparencies with each participant using an individual response sheet for his reactions.

3) An alternative method of determining the rank based upon educational philosophy is a Q-sort. The Pennsylvania Department of Education provides an example of an appropriate Q-sort in Manual Two: Identification of Critical Goals, 1975.

The Q-sort consists of a number of statements relevant to the Ten Goals of Quality Education. Each participant sorts the statements into five piles depending upon the extent of his agreement with each statement. The pile of statements with which the sorter agrees most has a value of one and the pile of statements viewed as least important is valued at five. The other piles fill in the remaining numbers in this range. The pattern of sorting produces data for analyzing the participant's position. This sorting procedure can also be accomplished as a small group activity using the group concensus as the basis for sorting statements into piles.

The total score for each of the Ten Goals of Quality Education is determined by examining the value scores (obtained from the one to five valued piles) for each goal. Each goal will have a numerical value determined by the value assigned to each of the statements pertaining to that goal and the value of the pile into which that statement is sorted. On a sheet of paper, the numerical value of each goal is indicated next to the goal number. Then a conversion value is assigned to each goal and recorded as the conversion value in Column E. The conversion value weights the data in Column E so that it is proportional to the numerical weights obtained in previous columns. Suggested conversion values are: zero points for the three most important goals (those having the lowest value scores) and six points for the three least important goals (those having the highest value scores) using three points for all other goals.

The school status report priority profile ranking demonstrated in "d" can be compared with a profile ranking based upon the educational philosophy data obtained in "e, #3". The Ten Goals of Quality Education are recorded in priority order to twelve vertical spaces by assigning those goals having the lowest value in Column E at the top of the range through those goals having the highest numerical value in Column E at the bottom of the column.

GOAL PROFILE RANK BASED UPON EDUCATIONAL PHILOSOPHY
(Data from Column E)

	Goal #
Highest Priority (Lowest Sum)	_____
	_____
	_____
	_____
	_____
	_____
	_____
	_____
	_____
	_____
Lowest Priority (Highest Sum)	_____

f. Column F is a summation of the numbers in Column D and E. In ranking the status profile scores for the goals or the philosophy where more than one group participates, an average score may be calculated for each goal, and the goals ranked on status profile or philosophy using this average.

g. The school status report priority profile rank of goals and the goal profile rank based upon educational philosophy may be inspected in a combined form by using the information from Column F. The Ten Goals of Quality Education are recorded in priority order as indicated on the next page:

	School Status Report Priority Profile Rank of Goals (Data from Column D)	Goal Profile Rank Based Upon Educational Philosophy (Data from Column E)	Overall Priority Ranking (Data from Column F)
	Goal #	Goal #	Goal #
Highest Priority (Lowest Sum)	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
Lowest Priority (Highest Sum)	_____	_____	_____
	_____	_____	_____

Long Range Planning Appendix C:
Analyzing Educational Quality Assessment

The results from the evaluation procedures, when analyzed by school personnel, give a diagnosis of the school's strengths and needs in the 10 goal areas. For example, a closer inspection of a low score on goal 1, self esteem, will enable school personnel to focus on those aspects of self-esteem that may have contributed to a lower overall score. Subscale information included in the report and item analyses, available at the educational quality assessment office, are means of pinpointing the needs.

Further information in the school report shows what conditions exist in the school and which of these resources tend to be related to student performance. An analysis of these correlations can suggest clues as to what school conditions are associated with high scores in a given goal area and may suggest some of these related conditions that may be changed.

A unit of the Division of Educational Quality Assessment is developing means of helping a school use educational quality assessment results to rank order needs--employing results of the school report and the local education agency's philosophy. This unit is also analyzing the findings of educational quality assessment over the past years and combining that with research findings suggesting strategies that might be employed to improve goal scores in each areas.

Methods for Determining Areas of Strength or Weakness in Student Performance:

Areas of Strength

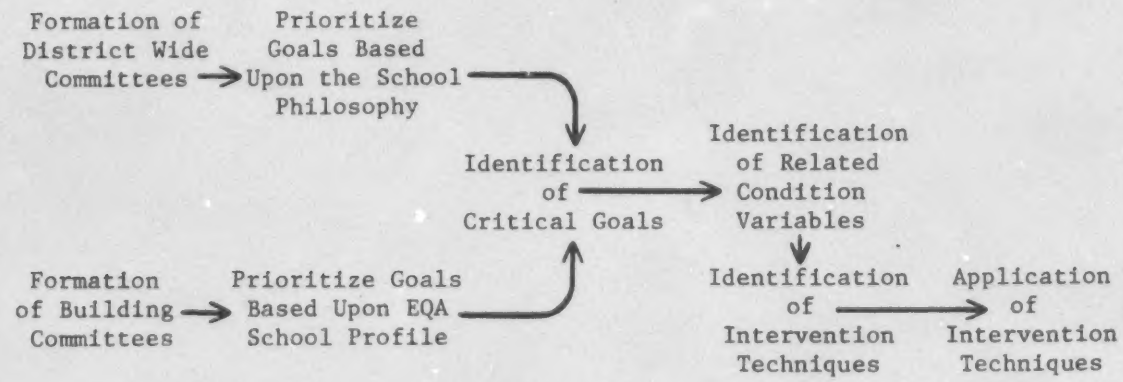
1. *Goals in which the "School Score" exceeds the 75th percentile.*
2. *Goals in which the "School Score" exceeds the upper limit of the "Predicted Score Range" and is above the 50th percentile.*

Areas of Weakness

1. *Goals in which the "School Score" is below the 25th percentile.*
2. *Goals in which the "School Score" is below the lower limit of the "Predicted Score Range" and is below the 50th percentile.*[8]

PRIORITIZATION: FLOW OF EVENTS

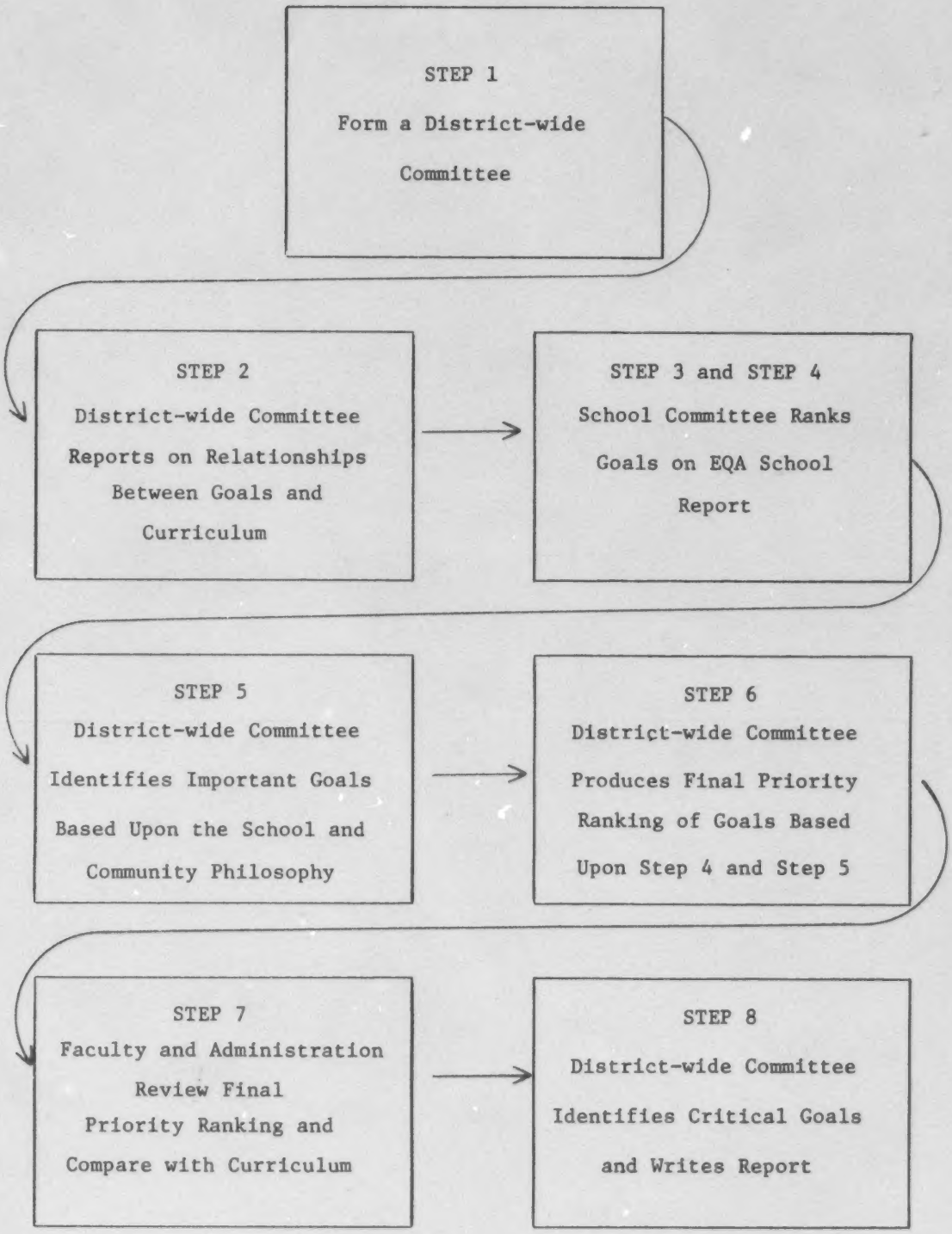
The flow chart below presents the events involved in the prioritization process within a school district.


Formation of District Wide Committees
Prioritize Goals Based Upon the School Philosophy
Identification of Critical Goals
Identification of Related Condition Variables
Formation of Building Committees
Prioritize Goals Based Upon EQA School Profile
Identification of Intervention Techniques
Application of Intervention Techniques

8 Long Range Planning Part I: Guidelines and Instructions, Pennsylvania Department of Education, 1974.

PRIORITIZATION: EDUCATIONAL QUALITY ASSESSMENT RESULT RELEASE

The development of district goals and philosophy should follow a prioritization process. Prioritization itself sets the scene for interpreting Educational Quality Assessment results to the publics a school serves. Chapter V: "Communicating Educational Quality Assessment and Other Needs Assessment Results to the Publics a School Serves," presents methods of communicating test results to the publics a school serves. Educational Quality Assessment Publicity Suggestions, published by the Pennsylvania Department of Education in 1974, is a helpful resource in this regard. In releasing the report to the publics served by a school, the flow chart on the following page would apply.


STEP 1
Form a District-wide Committee
STEP 2
District-wide Committee Reports on Relationships Between Goals and Curriculum
STEP 3 and STEP 4
School Committee Ranks Goals on EQA School Report
STEP 5
District-wide Committee Identifies Important Goals Based Upon the School and Community Philosophy
STEP 6
District-wide Committee Produces Final Priority Ranking of Goals Based Upon Step 4 and Step 5
STEP 7
Faculty and Administration Review Final Priority Ranking and Compare with Curriculum
STEP 8
District-wide Committee Identifies Critical Goals and Writes Report

ADDITIONAL APPROACHES TO PRIORITIZATION

Additional methods of identifying educational needs as determined by the school community include commercially available kits. These include Q-sorts, checklists, objectives, detailed manuals, and other data which would assist the the goal prioritization process.

Needs Assessment in Education: A Planning Handbook for Districts

State of New Jersey
Department of Education
Bureau of Planning
225 West State Street
Trenton, New Jersey 08625

Elementary School Evaluation Kit

Center for the Study of Evaluation
Allyn and Bacon, Inc.
Longwood Division
Boston, Massachusetts 02210

Educational Goals and Objectives: A Model Program for Community and Professional Involvement

Phi Delta Kappa, Inc.
Eighth and Union
Box 789
Bloomington, Indiana 47401

School Program Bonanza Game

by David J. Mullen
School Bonanza Game Corporation
147 Chinquapin Way
Athens, Georgia 30601

CHAPTER 8:

PLANNING HOW TO GET THERE: ORGANIZING CURRICULUM AROUND DISTRICT GOALS

GOAL DEVELOPMENT AND DISTRICT CURRICULUM

Local curriculum is usually developed from goals derived at the state and district levels. Then school goals and program goals are considered. Too often, curricula are introduced without assessing the needs and priorities of the district and the specific program involved. Thus, the first step in organizing curriculum around district goals and needs is to determine current status and desired direction by answering the following questions: "Where we have been?" "Where we are not?" "Where are we going?" "Where we want to go?" "How will we get there?" "How will we know when we arrive where we want to be?" This assessment and goal setting process must never cease for an educational program to remain dynamic.

Goal setting and prioritization processes have been discussed at length in Chapter II: "The Long Range Planning Process"; Chapter IV: "Community Involvement in Long Range Planning"; Chapter VI: "Needs Assessment Instruments and Processes"; and Chapter VII: "Prioritizing District Goals."

General suggestions in curriculum development include:

1. Build some reward system as an incentive to participants. Such a system can be developed at little or no cost. For example, preference can be given for additional pay assignments such as summer school instruction to personnel who write courses. In schedule preparation, preference can be given to personnel who write courses. Dissemination of curriculum development among peers is an incentive. A small support fund can be established for any extra items the staff might desire. Whether this is

spent for coffee, dinners, or instructional extras is not important. The involvement of staff in spending it and availability of such a discretionary fund is the positive aspect. A little latitude in purchasing can be highly motivating. In developing a system, remember that rewards should be inherent at all levels.

2. Be specific with short range goals and with objectives. Intermediate and long range goals can be broader and more diffuse. Activity statements should be very specific and limited to learner behavior.

3. Evaluate curriculum continually. Internal and external audits should be included. Feedback from students regarding career practicality is important. Peer evaluations are also helpful. Try evaluations by peers and/or students in which only positive feedback is noted. While less threatening than standard approaches to evaluation, this method is none the less a revealing one. Objective feedback can be provided in an internal audit by a district's own staff or by an external educational audit team. Assessment should always be a part of the school planning and it should appear at the building, team or committee or department, and individual teacher levels. The total educational picture should be monitored for reliability and validity.

4. The need for curriculum change must be felt by the staff to effect programatic and attitudinal changes in classroom technique. External forces which create change are real and may stimulate surface changes. But, the more subtle change initiators of peer

involvement, internal motivation to teach more effectively, committment developed during committee work, and other involvement models are far more effective in creating a change in classroom practices. Teacher attitude determines the degree of success of educational changes. Small group faculty meetings and "rap sessions" can be very helpful in building committment. Such small group meetings can provide a solid basis for peer support, demonstration teaching, teaming, intervisitation, and other supervisory techniques aimed at the improvement of instruction.

5. Curriculum development committees should have representatives from various disciplines, community, and students to produce more objective programs. The chief administrator should sit in on the initial meeting to set the tone and then should let the committee proceed using brainstorming and other creative thought techniques to gather ideas. Next the goals and objectives of the new program must be established. Then the existing program must be reviewed to determine what to retain, what to expand, and what to discard. The committee should be structured so that leadership and internal checks on work progress are built in. A target date for each stage of the work will be helpful. The chief administrator should make periodic suggestions as he deems appropriate. Assistance should be provided to the committee in any reasonable area of support.
6. Change can be fostered in a school system by identifying and then working with those personnel who are ready to change. As in clinical supervision, goals can be mutually agreed upon. The

period-long faculty meeting and other small group approaches may be helpful. Support of the personnel who want to change t. improved education for students is a very positive change catalyst. The chief administrator should analyze his own leadership style and then develop a specific plan to foster positive educational change in his district. The plan should be shared with district staff and the community so that the effort becomes a mutual one. Dissemination and success will become self-reinforcing in this effort.

Identifying those staff interested in change and supporting them will not work for everyone. Where this method suits the administrative style of the leader, it provides on-going impetus to the change process as those involved in it will feel secure enough to speak out about how the program is working, evaluate it, and maintain a feeling of continuity in spite of changes in technique, content, or attitude.

In summary, for successful curriculum and instructional change, concern should be directed toward: the attitude of teachers, existing program strengths, locally based needs assessment, peer leadership, and definite goals and plans to accomplish them.

CURRICULUM DEVELOPMENT STAGES AND FORMAT

The format which follows is a three stage process for the development of curriculum. A consensus model of decision making is used rather than a voting procedure to increase objectivity and committment to the product and process. Stage I is completed before Stage II is initiated and so on. The signature lines provide periodic program checks to insure that the

agreed upon target dates and goals are met and to insure two way communication between the administrator and committee members responsible for the assignment.

The forms which follow pertain to building level curriculum. The same approach can be used for district-wide curriculum development. Overlap among the stages is eliminated when the curriculum is edited for use by the teaching staff from the committee worksheets.

Curricula under development should be circulated in working paper form and given trial runs in classrooms. Opportunities for additional staff input should be presented before a curriculum is board adopted. Even then it should be regarded as a resource and guide for the teacher, rather than as a definitive, self-limiting instructional scope and sequence.

I

STATE GOAL: _____

_____

SCHOOL GOAL: _____

_____

OBJECTIVES TO REACH GOAL:

(1)_____

(2)_____

(3)_____

(4)_____

(5)_____

(6)_____

(7)_____

(8)_____

(9)_____

(10)_____

COMMENTS:_____

_____

_____

_____

_____

_____

DATE:_____ Principal_____

Committee
Chairperson_____

II

SCHOOL GOAL: _____

_____

SPECIFIC OBJECTIVE (from Stage I): _____

_____

BEHAVIORAL OBJECTIVES:

(1)_____

(2)_____

(3)_____

(4)_____

(5)_____

(6)_____

(7)_____

(8)_____

(9)_____

(10)_____

COMMENTS: _____

_____

_____

_____

_____

_____

_____

DATE:_____ Committee Name_____

Committee Chairperson_____

III

STATE GOAL: _____

_____

SCHOOL GOAL: _____

_____

SPECIFIC OBJECTIVE: _____

_____

BEHAVIORAL OBJECTIVE (from Stage II): _____

_____

LEARNING ACTIVITIES:

(1) _____

(2) _____

(3) _____

(4) _____

(5) _____

(6) _____

(7) _____

(8) _____

(9) _____

(10) _____

ASSESSMENT: _____

_____

_____

COMMENTS: _____

_____

_____

DATE: _____ TEACHER: _____

The plans on the following pages were developed by small groups during a long range planning workshop as plans of action to implement a program aimed at improving attitude toward school and learning. The flow chart idea presented on pages 108 through 112 with target dates for completion may be attractive to some districts as a workable format for completing Section 11A.

I

STATE GOAL: *Interest in School and Learning*

SCHOOL GOAL: *Improving Attitude Toward School*

OBJECTIVES TO REACH GOAL:

(1) *Emphasize variation in teaching techniques.*

(2) *Improve teacher attitude toward school.*

(3) *Involve students in curriculum planning.*

(4) *Assist teachers in becoming more student oriented.*

(5) *Evaluate students related to course goals.*

(6) *Support parental interest in school.*

(7) *Foster community support of school programs.*

(8) *Develop more flexible attendance policies (student choice).*

(9) *Provide more selection of subject material.*

(10) *Solicit student input when developing criteria for teacher selection.*

COMMENTS: *The above objectives are based on the assumption that the student, parents and community are closely related to the schools.*

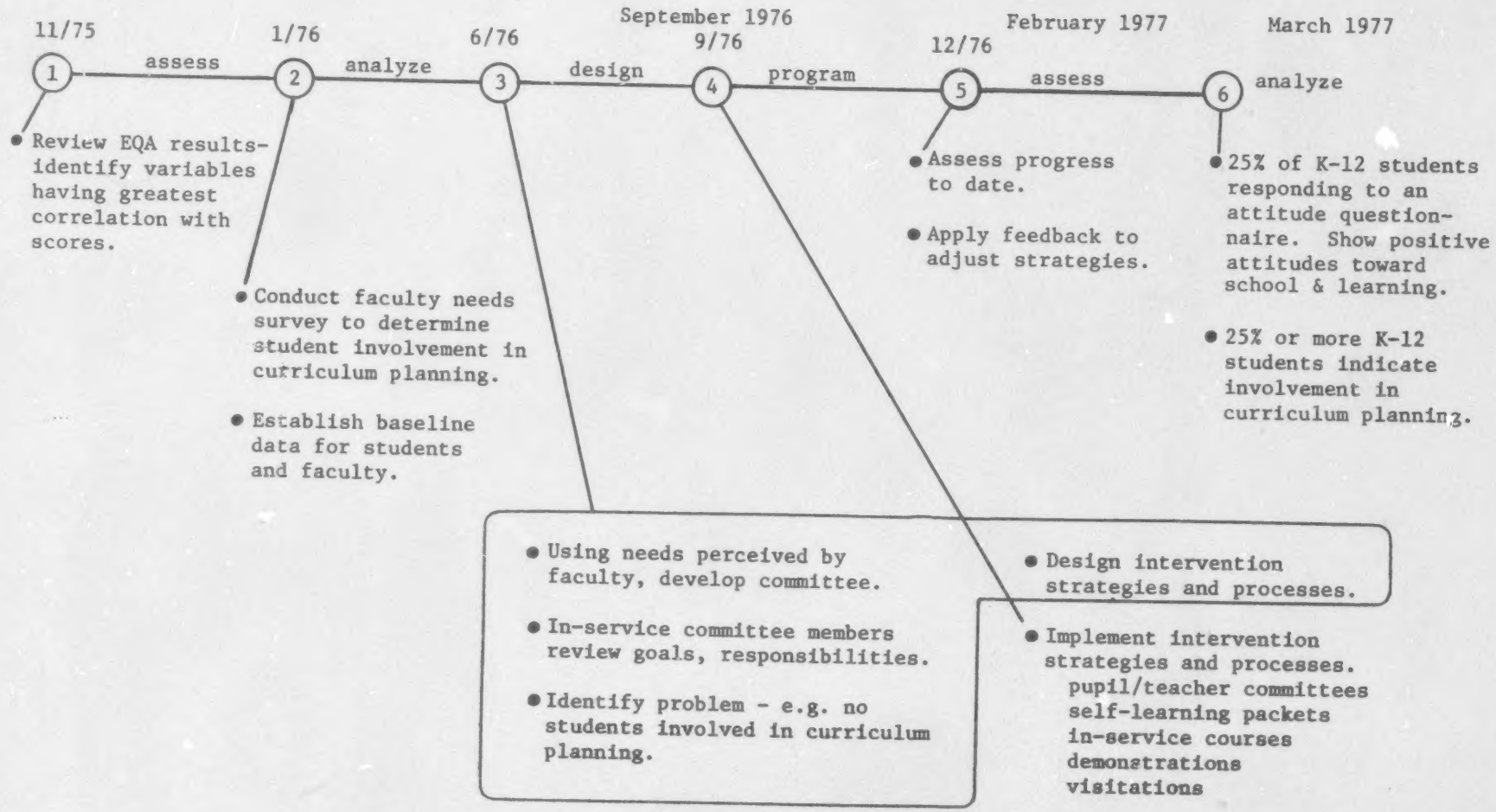
DATE: _____ Principal _____

Committee Chairperson _____

GOAL: *Interest in School and Learning*

OBJECTIVE: *Develop maximum student involvement in curriculum planning*

ACTIVITIES:



II

SCHOOL GOAL: *Improving Attitude Toward School*

SPECIFIC OBJECTIVE (from Stage I): *Improvement of Teacher Attitude Toward School*

BEHAVIORAL OBJECTIVES:

(1) *Develop a "no cost" system of rewards for extra activities.*

(2) *Provide commendations on a regular basis to teachers with copies on file.*

(3) *Designate teachers in district to provide formal and informal inservice.*

(4) *Publish teacher programs in board reports and district newsletters.*

(5) *Provide behavior modification training for teachers.*

(6) *Encourage teacher intervisitation between buildings and rooms.*

(7) *Provide 95% availability of administrators and department chairman to assist teachers on curriculum matters.*

(8) *Provide continuous inservice programs for administrators in the area of interpersonal relationships.*

(9) *Encourage peer evaluations based on positive comments alone followed by debriefing sessions.*

(10) *Insure 95% availability of administrators and department chairman to visit classrooms on request.*

COMMENTS: _____

DATE: _____ Committee Name _____

Committee Chairperson _____

I

STATE GOAL: *Interest in School and Learning*

SCHOOL GOAL: *Develop positive attitudes related to learning with 80% of student body.*

OBJECTIVES TO REACH GOAL:

(1) *Use item analysis of Educational Quality Assessment results related to Goal IV as basis for evaluation.*
(2) *10% decrease in unexcused absences.*
(3) *Raise average overall attendance 95%.*
(4) *Increase number of learning tasks successfully completed by 10%.*
(5) *Design successful experiences for various levels of learning.*
(6) *Develop satisfied, productive, teacher-student orientation.*
(7) *Apply the continuous progress philosophy and individualization.*
(8) *Educational climate of classroom will improve as evidenced by 50% decrease in discipline referrals.*
(9) *Student involvement in planning learning - increased by at least 50%.*
(10) *Voluntary effort - self-paced - self-directed and motivated learning increased by 50%.*

COMMENTS: *District goal - completion of building goals.*

DATE: _____ Principal _____

Committee Chairperson _____

INTERVENTION STRATEGIES FOR THE TEN GOALS OF QUALITY EDUCATION

The twenty-three Quality Education Program Study (Q.U.E.P.S.) Booklets are available in microfiche form from Research and Information Services for Education (R.I.S.E.), 198 Allendale Road, King of Prussia, Pennsylvania 19406. These booklets discuss each of the Ten Goals of Quality Education including possible rationales for areas of effective student behavior and related teaching strategies. The Guides to Strategies for Improvement being developed by the Pennsylvania Department of Education will detail suggested intervention strategies for each of the Ten Goals. Resources for instructional methods not listed under one of the Ten Goals of Quality Education follow. This information may assist districts in program development related to the Ten Goals of Quality Education.

TITLE	AUTHOR	PUBLISHER
Eighth Report of the International Clearinghouse on Science and Mathematics	Lockard, J. David	American Association for the Advancement of Science
Sets of Models for Teaching Math, English, Science, Social Studies	_____,	Croft-NEI Publications
A Sourcebook of Elementary Curricular Programs and Projects ALERT	Henrie, Samuel N. et al	Docent Corporation
Independent Study	Trump, J. Lloyd Jr. et al	National Association of Secondary School Principals
Educational Media	_____,	National Educational Association Publication
Elements of the Learning Process	_____,	National Educational Association Publication
Guided Study and Homework	_____,	National Educational Association Publication
Nursery School and Kindergarten	_____,	National Educational Association Publication

Teaching Handwriting	Andersen, Dan W.	National Educational Association Publication
Teaching High School Science	Koran, John J., Jr.	National Educational Association Publication
Teaching Social Studies	McLendon, Jonathon C.	National Educational Association Publication
Curriculum Materials Clearinghouse Microfilms #CB00151-CB00260	_____,	Xerox Corporation
Curriculum Materials Clearinghouse Microfilms #CB00001-CB00150	_____,	Xerox Corporation
Curriculum Materials Clearinghouse Index and Curriculum Briefs	Curtis, Wilfred M., editor	Xerox Corporation

Resources which may assist districts in planning intervention strategies in specific areas of the Ten Goals of Quality Education are listed by goal.

SELF ESTEEM (GOAL 1)

TITLE	AUTHOR	PUBLISHER
Places for Learning Places for Joy	Sizer, Theodore R.	Harvard Press
Values and Teaching	Raths, Louis E., et al	Merrill, Charles E. Publishing Company
Humanistic Education Sourcebook	Simon, Sidney B.	Prentice-Hall Incorporated
Achievement Competence Training	Hill, Russell A.	Research for Better Schools
Human Teaching for Human Learning: An Introduction to Confluent Education	Brown, George Isaac	The Viking Press
Instructional Tactics for Affective Goals	Popham, W. James	Vimcet

UNDERSTANDING OTHERS (GOAL 2)

TITLE	AUTHOR	PUBLISHER
Human Interaction in Education	Stanford, Gene et al	Allyn and Bacon, Inc.
20 Interaction Exercises for the Classroom	Albertson, Richard D., et al	Learning Resources Corporation
Values and Teaching	Raths, Louis E. et al	Merrill, Charles E. Publishing Company
Educational Games and Simulations	Heitzmann, William Ray	National Education Association Publications
Group Processes in Elementary and Secondary Schools	_____,	National Education Association Publications
Listening: From Sound to Meaning	_____,	National Education Association Publications
Teaching the Disadvantaged	_____,	National Education Association Publications
Understanding Intergroup Relations	Grambs, Jean D.	National Education Association Publications
Understanding Intergroup Relations: A Person to Person Experience	_____,	National Education Association Publications
Human Relations	Whaley, Nita B.	National School Public Relations Association
Guide to Strategies for Improvement, Goal II, Understanding Others	_____,	Pennsylvania Department of Education
Humanistic Education Sourcebook	Simon, Sidney B.	Prentice-Hall, Inc.
Games for Growth	Gordon, Alice Kaplan	Science Research Associates, Inc.
Humanizing Educational Objectives	Baker, Eva	Vimcet

BASIC SKILLS: VERBAL (GOAL 3)

When Every High School Teacher is a Reading Teacher	_____,	National Education Association Publications

Teaching Reading Package (Kit)	_____,	National School Public Relations Association
Analyzing Learning Outcomes	Baker, Eva L.	Vimcet Associates
Appropriate Practice	_____,	Vimcet Associates
The Teaching of Reading	Baker, Eva L.	Vimcet Associates

BASIC SKILLS: MATH (GOAL 3)

Teaching Secondary School Mathematics	Henderson, Kenneth B.	National Education Association Publication
The Laboratory Approach to Mathematics	Kidd, Kenneth P. et al	Science Research Associates, Inc.
Analyzing Learning Outcomes	Baker, Eva L.	Vimcet Associates
Appropriate Practice	_____,	Vimcet Associates

INTEREST IN SCHOOL AND LEARNING (GOAL 4)

Administering Individualized Programs	Bishop, Lloyd	Evans Newton, Inc.
Classroom Management Techniques for Individualized Learning	Bishop, Lloyd	Evans Newton, Inc.
The Individual Instruction Handbook	Bishop, Lloyd	Evans Newton, Inc.
Change for Children	Kaplan, Sandra Nina, et al	Goodyear Publishing Company, Inc.
Individualizing Educational Systems	Bishop, Lloyd K.	Harper and Row Publishers, Inc.
Individualizing Through Learning Stations	Godfrey, Lorraine L.	Individualizing Books Publishing Company
Developing Attitude Toward Learning	Mager, Robert F.	Lear Siegler, Inc., Fearon Publishers
Individualizing of Instruction	Howes, Virgil M.	MacMillian Publishing Company, Inc.
Individualizing Instruction in Science and Mathematics	Howes, Virgil M.	MacMillian Publishing Company, Inc.

Values and Teaching	Raths, Louis E., et al	Merrill, Charles E. Publishing Company
Anxiety as Related to Thinking and Forgetting	Lighthall, Frederick F.	National Education Association Publication
Motivation Teaching and Learning	Gallagher, James J.	National Education Association Publication
Individualizing in Schools	_____,	National School Public Relations Association
IPI: An Individualized Approach	Gall, Peter	National School Public Relations Association
Individualized Teaching in Elementary Schools	Stahl, Dona Kofod, et al	Parker Publishing Company, Inc.
Teaching Ideas That Make Learning Fun	Peck, Matilda	Parker Publishing Company, Inc.
Guide to Strategies for Improvement, Goal IV, Interest in School and Learning	_____,	Pennsylvania Department of Education
Humanistic Education Sourcebook	Simon, Sidney B.	Prentice-Hall, Inc.
Individualizing Instruction	Bell, Helen Davis	Science Research Associates, Inc.
Developing Individualized Instruction Material	Johnson, Stuart R. et al	Westinghouse Learning Press
Individualized Instruction: Every Child A Winner	Noar, Gertrude	Wiley, John & Sons, Inc.
Individualized Instruction	Popham, W. James	Vimcet Associates
Knowledge of Results	Popham, W. James	Vimcet Associates

CITIZENSHIP (GOAL 5)

Effective Instruction Thru Dynamic Discipline	_____,	Merrill, Charles E. Publishing Company
Values and Teaching	Raths, Louis E., et al	Merrill, Charles E. Publishing Company
Anxiety as Related to Thinking and Forgetting	Lighthall, Frederick F.	National Education Association Publication

Classroom Group Management	_____,	National Education Association Publication
Controlling Classroom Misbehavior	_____,	National Education Association Publication
Coping with Disruptive Behavior	Davis, Jean E.	National Education Association Publication
Humanistic Education Sourcebook	Simon, Sidney B.	Prentice-Hall, Inc.
Unit 1: Observing Behavior (Kit)	Brown, Paul L. et al	Research Media, Inc.
Unit 2: Increasing Behavior (Kit)	Brown, Paul L. et al	Research Media, Inc.
Unit 3: Decreasing Behavior (Kit)	Brown, Paul L. et al	Research Media, Inc.
Unit 4: Creating New Behavior (Kit)	Brown, Paul L. et al	Research Media, Inc.
Unit 5: Implementing the System (Kit)	Brown, Paul L. et al	Research Media, Inc.
Observing Behavior	Brown, Paul L. et al	Research Media, Inc.
Increasing Behavior	Brown, Paul L. et al	Research Media, Inc.
Decreasing Behavior	Brown, Paul L. et al	Research Media, Inc.
Creating New Behavior	Brown, Paul L. et al	Research Media, Inc.
Implementing the System	Brown, Paul L. et al	Research Media, Inc.
Discipline	Baker, Eva L.	Vimcet Associates

HEALTH HABITS (GOAL 6)

Working Paper - Guide to Strategies for Improvement, Goal VI, Health Habits, 1975	_____,	Pennsylvania Department of Education

CREATIVITY (GOAL 7)

The Open Classroom - Making It Work	Blitz, Barbara	Allyn and Bacon, Inc.
Learning Centers: A Practical Approach	_____,	Claremont Educational Resources
Arranging the Informal Classroom	_____,	Educational Development Center
Center Stuff for Nooks, Crannies and Corners	Forte, Imogene, et al	Incentive Publications, Inc.
Creative Math for the Young Child	Forte, Imogene, et al	Incentive Publications, Inc.
Creative Science for the Young Child	Forte, Imogene et al	Incentive Publications, Inc.
Kids' Stuff, Intermediate-Junior	Forte, Imogene et al	Incentive Publications, Inc.
Kids' Stuff, Kindergarten and Nursery School	Forte, Imogene et al	Incentive Publications, Inc.
Kids' Stuff Math	Forte, Imogene et al	Incentive Publications, Inc.
Cornering Creative Writing	Forte, Imogene et al	Incentive Publications, Inc.
Kids' Stuff, Primary Level	Forte, Imogene et al	Incentive Publications, Inc.
The Kids' Stuff Activity Cassette Tape	Forte, Imogene et al	Incentive Publications, Inc.
The Kids' Stuff Activity Record	Forte, Imogene et al	Incentive Publications, Inc.
The Learning Center Set	Forte, Imogene et al	Incentive Publications, Inc.
Pumkins, Pinwheels and Peppermint Packages	Forte, Imogene et al	Incentive Publications, Inc.
A Practical Guide to the Open Classroom	Campbell, David N.	Kendall/Hunt Publishing Company
Art Education in the Elementary School	Lewis, Hilda	National Education Association Publication
Creativity	Torrance, E. Paul	National Education Council

Creativity: A Way of Learning	_____,	National Education Association Publication
The Gifted Child in the Elementary School	Gallagher, James J.	National Education Association Publication
Informal Education, Open Classroom Provokes Change, Controversy	_____,	National School Public Relations Association
The Open Classroom	Kohl, Herbert R.	New York Review
Guide to Strategies for Improvement, Goal VII, Creativity, 1975	_____,	Pennsylvania Department of Education
Independent Activities for Creative Learning	Darrow, Helen Fisher, et al	Teachers College Press
Opening Classroom Structure	Baker, Eva	Vimcet Associates

VOCATIONAL DEVELOPMENT (GOAL 8)

Guide to Strategies for Improvement, Goal VIII, Career Awareness, 1975	_____,	Pennsylvania Department of Education

APPRECIATING HUMAN ACCOMPLISHMENTS (GOAL 9)

Values and Teaching	Raths, Louis E., et al	Merrill, Charles E. Publishing Company
Guide to Strategies for Improvement, Goal IX, Appreciating Human Accomplishments, 1975	_____,	Pennsylvania Department of Education
Humanistic Education Sourcebook	Simon, Sidney B.	Prentice-Hall, Inc.

PREPARING FOR A CHANGING WORLD (GOAL 10)

Schools in Search of Meaning	MacDonald, James B., et al	Association for Supervision and Curriculum Development
Achievement Competence Training	Hill, Russell A.	Research for Better Schools, Inc.

PLANNING HOW TO GET THERE: ORGANIZING CURRICULUM AROUND DISTRICT GOALS: SELECTED REFERENCES

Alberty, Harold B. and Alberty, Elsie, Jr., Reorganizaing the High School Curriculum, The MacMillan Company, New York, New York, 1962.

Cawelti, Gordon, Vitalizing the High School, ASCD, Washington, D.C., 1974.

Doll, Ronald C., Curriculum Improvement: Decision-Making and Process, Allyn and Bacon, Inc., Boston, Massachusetts, 1964.

Ellena, William J., ed., Curriculum Handbook for School Executives, AASA, Arlington, Virginia, 1973.

Foshay, Arthur W., Curriculum for the 70's: An Agenda for Invention, NEA, Washington, D. C., 1970.

Hass, Glen, et al, Curriculum Planning: A New Approach, Allyn and Bacon, Inc., Boston, Massachusetts, 1974.

Kaplan, Bernard A, Tecker, Glenn, and Barnard, Betsey, Goal Development in Education, State of New Jersey, Department of Education, Trenton, New Jersey, 1974.

Leeper, Robert R., Curriculum Decisions - Social Realities, ASCD, Washington, D. C., 1968.

Macdonald, James B. and Zaret, Esther, Schools in Search of Meaning, ASCD, Washington, D. C., 1975.

McGovern, E. Gaye, "Developing the Resource Unit," Xerox Curriculum Materials Clearinghouse, March, 1975.

Payne, Arlene, The Study of Curriculum Plans, NEA, Washington, D. C., 1969.

Roberts, Arthur D., Educational Innovation: Alternatives in Curriculum and Instruction, Allyn and Bacon, Inc., Boston, Massachusetts, 1975.

Trump, J. Lloyd and Miller, Delmas F., Secondary School Curriculum Improvement, Allyn and Bacon, Inc., Boston, Massachusetts, 1968.

_____, 25 Action Learning Schools, NASSP, Reston, Virginia, 1974.

Unruh, Glenys G., ed., New Curriculum Development, ASCD, Washington, D. C., 1965.

Unruh, Glenys G. and Leeper, Robert R., Influences in Curriculum Change, ASCD, Washington, D. C., 1968.

_____, What Are the Sources of the Curriculum?, ASCD, Washington, D. C., 1962.

Wiles, Kimball, Strategy and Curriculum Change, ASCD, Washington, D. C., 1965.

Wilson, L. Craig, The Open Access Curriculum, Allyn and Bacon, Inc., Boston, Massachusetts, 1971.

Zenger, Weldon F. and Zenger, Sharon K., Writing and Evaluating Curriculum Guides, Fearon Publishers, Belmont, California, 1973.

CHAPTER 9:

THE PENNSYLVANIA LONG RANGE PLAN

STATE EMPHASIS ON CURRICULUM

State school regulations governing long range planning were unanimously amended on Friday, March 15, 1974, by the Pennsylvania State Board of Education. The mandate now specifies:

§ 5.151 Long-range development plan.

Every school district shall submit to the Department of Education for approval a long range development plan in such form as may be required by the Secretary of Education. This plan shall be based upon the findings of Educational Quality Assessment and shall include but not be limited to: a statement of district goals and/or objectives, evidence of community involvement, a plan for affirmative action and equal rights, a description of physical facilities, population projections, evidence of inter-district coordination of activities, financial data about the school district and a description of supplemental school activities.

§ 5.152 Participation.

Participation in the development of the long range plan shall include but not be limited to administrators, teachers, students and community persons.

§ 5.153 Schedule.

(a) The Secretary of Education shall develop a schedule for districts to submit long range plans coordinating this schedule with participation in its Educational Quality Assessment program.

(b) For failure to submit the plan as scheduled, the Secretary of Education may take any of the following actions:

(1) Withhold any or all of the instructional subsidies due such district.

(2) Withhold building subsidy.

(3) Deny the award of any state or federal discretionary or incentive funds available to the department.

(4) Withhold approval of requests for curriculum exceptions and modification of school schedules as provided for in the Act of July 30, 1969 (No. 80), (24 P. S. 15-1504).[9]

In preparing guidelines and forms to implement the State Board of Education regulations regarding long range planning in Pennsylvania some areas were retained from the 1967 format and other areas were added. The emphasis now is upon educational program and supporting services rather than upon school facilities, demographic data, and financial projections. The chart which follows summarizes the differences between the new and prior long range planning guidelines.[10]

---

9 Pennsylvania Bulletin, Volume 4, No. 17, Saturday, April 20, 1974, pp. 762-763, and Pennsylvania State Board of Education, Curriculum Requirements, Chapter 5, Section 5.151

10 Adapted from Chapter II, How To Do It, a working paper distributed in September 1974 by the Pennsylvania Department of Education.

NEW GUIDELINES	PREVIOUS GUIDELINES
1. Major Emphasis	
-Educational Programs and Services	-School Facilities
2. Time Requirements	
-Five Year Projections	-Ten Year Projection
-Three Year Update (tied to EQA cycle)	-Two Year Update
3. Reporting Format	
-Specific forms designed to require only summary information	-No prescribed reporting format -No recommendation for brief reporting rather than long narratives
4. Directions for Completion	
-Specific statements to be answered	-Rather loosely defined
5. Contents	
-Community Involvement	-General Introduction
-Administrative Unit	Administrative Unit
-Staff Development	Existing School Systems
-Pupil Enrollment Projections	Educational Program
-Educational Quality Assessment	-Community Growth
-Equal Opportunity	Population
-Educational Programs	Transportation
Services (four sub-sections)	Services
-School Facilities	-School Facilities
-Finance	-Finance
6. Community Involvement	
-Required	-Recommended but not required
7. Educational Program	
-Reported by EQA Goals and district goals	-Reported by subject and/or department areas
8. Review Criteria	
-Written criteria for PDE staff	-No written criteria for PDE staff
-Disseminated to districts	
9. Guidance & Support	
-Assistance & advice available from IU and PDE	-None
-Intended to help district develop plan that will be acceptable	
-Intended to help district achieve district-determined plan	

PROCESS APPROACH

The Pennsylvania Long Range Plan emphasizes the planning process rather than the plan itself or the product. While the plan submitted to the Pennsylvania Department of Education is an outcome of the long range planning procedure, another valuable outcome is the examination of district needs in a systematic manner involving input from many sources. The involvement of the publics a school district serves in goal setting, the examination of needs assessment measures to augment the Educational Quality Assessment conducted by the Pennsylvania Department of Education, and the development of educational programs to meet specific needs should become integral parts of educational decision-making at the local level, not because the long range plan was mandated, but because the process of preparing the plan enables the school district to adapt a systematic approach for change to educational need, and local administrative style. The emphasis upon student need as a basis for program selection and facilities planning is a major objective of the new format.

In completing each of the nine sections of the long range plan, each district will go through six steps. First, establish where the school district is at the present time. Needs assessment such as Educational Quality Assessment, questionnaires, and longitudinal standardized testing programs should be included. Secondly, determine where the district wants to be in five years. District administrative personnel and the board determine this after examining available resources. Thirdly, the expectations of the school district's consumers must be defined. This is a collective goal setting procedure to be effected by teachers, support staff, community, and students. At times, expectations will diverge from

the direction in which a district is headed. Perhaps the Board has adopted the Ten Goals of Quality Education as district goals. Is this really what the consumers of the educational program expect? Should additional goals be formulated to accurately reflect local desires? Fourth, consider the implications the defined expectations have upon the multiple systems of which the school district is a part. Political, educational, administrative, and social systems must be taken into account. What impact will the defined expectations have upon these systems? In what ways can these systems assist in effectuating the desired goals? Fifth, consideration must be given to a step-by-step analysis of the programs necessary to achieve the goals. Finally, criteria must be established for evaluation so that the district will know when the desired goals have been accomplished.

The preceding discussion of long range planning as a balanced growth process can be summarized in the following questions:

1. Where are we now?
2. Where does the district wish to be five years hence?
3. What are the expectations and needs of the community, school staff, and students?
4. What implications do the above have upon the systems of which the district is a party?
5. What do we have to do to achieve them?
6. How will we know when our goals are reached?

STEPS IN PREPARING THE LONG RANGE PLAN

There is a role for everyone in preparing for the long range plan as it is presently established. Professional organizations, community persons,

teachers, board, intermediate unit and Pennsylvania Department of Education staff all have a part in carrying out the planning process. The superintendent's responsibility is to put all these resources together in a manner suited to his administrative style and to district needs and expectations.

The section which follows outlines elements considered by the author to be basic to the success of the long range planning process, not only in preparing a workable plan but in bringing about the identification of goals and programs for change after a careful analysis of educational needs at the local level.

Long Range Planning Coordinator

Some superintendents will act as their own long range planning coordinator. Others will appoint an individual to assume this responsibility. A great deal will depend upon the staff available and the size of the district. The long range planning coordinator should have clearly defined responsibilities. These duties should be disseminated to others involved in the planning process to expedite communication and coordinated progress in long range planning. Suggested areas to include in the responsibilities of the long range planning coordinator are: arranging committees, setting meetings and all related backup data, public relations releases and presentations, orientation of all long range planning committees, editing of writing necessary for the plan, budget management related to preparation of the plan, liaison with the community, orientation of professional and nonprofessional staff, dissemination of information to school board. These duties may be shared with the superintendent and adapted depending upon the individual's skills and professional assignment. A

teacher would be effective as a long range planning coordinator as would an administrator. Much depends upon local need and staff available. While the actual duties are very flexible and will vary from one district to another, it is universally important to identify this person early and rely upon his skills from the beginning of the program. If at all possible, one third to one half of his time should be devoted to long range planning during the year preceding submission of the plan to the Pennsylvania Department of Education.

The School Board

Prior to presenting the long range plan to the Pennsylvania Department of Education, the local Board of Education must formally adopt it as the legally constituted body responsible for its execution. Involvement of the school board from the notification of a district's assignment to a long range planning cycle is essential. The school board should regularly review working papers of the various committees developing the long range plan and have an opportunity to discuss the progress of the plan with the superintendent, administrative team and public at large.

The Publics Served by the School District

Many publics are served by a school district. Early and ongoing public relations efforts will be rewarded with understanding of the commitment to the long range plan and the district goals it is designed to accomplish. A variety of approaches should be used to insure public disclosure of all relevant phases of the long range planning process. Suggested means of communicating with the publics served by a school district are discussed in Chapter 5: "Communicating Educational Quality Assessment and Other Needs Assessment Results With The Publics A School Serves."

Community involvement is required in the long range plan as it is critical to successful implementation of the plan's recommendations. Before selecting the means of community involvement, review Chapter 4: "Community Involvement in Long Range Planning," to evaluate the suitability of a citizen's advisory committee to assist school personnel in defining the goals the school district's constituents value. The community involvement methods employed should aim at broad participation. An analysis of the cultural, economic, civic, religious, and other layers of the community will assist in defining target groups. Not all members of the community are vocal or organized, yet the school district represents their interests.

Groups to consider for inclusion in surveys, committees, mailings, hearings, or other means of community involvement are:

Ad Hoc Groups
Adult Education Center
American Association of University Women
American Business Clubs
American Red Cross
Americans for Competitive Enterprise
Area Media--Print and Non-print
Athletic Clubs
Board of Education
Booster Clubs
Boy Scouts of America
Boys Club
Business and Professional Women's Club
Camp Fire Girls
Certified Employes
Chamber of Commerce
Citizens at Large
City and County Planning Commissions
City or Town Council
Civic Club
Coalition Groups
Colleges and Universities--Locally
Community Businesses
Concerned Citizens Groups
County Commissioners
Cultural Organizations
Downtown Business Men's Associations
Elks Club
Ethnic Organizations and Clubs
Federation of Women's Clubs
Fraternities
Frontier Club
Girl Scouts of America
Goodwill Industries
Historical Society
Housing Authority
Informal Groups
Junior Achievement
Junior Chamber of Commerce
Junior League
Kiwanis Club
League of Women Voters
Library
Lions Club
Local Task Force
Model City Agency
Municipal Officials
Neighborhood Agencies
Optimist Club

PTA, PTO
Pennsylvania Economy League
Pilot Club
Property Owners
Recreation Board
Religious Leaders
Rotary Club
Salvation Army
School Administrators
School Advisory Committees
Senior Citizens Organizations
Sororities
Speakers Bureau
Student Council
Student Organizations
Students
Taxpayers Organizations
Teachers and Other Professional Organizations
Theater Groups
Title I Parents
Toastmasters
Unions
Ventura Club
Vocational and Trade-Technical Educational Agencies
Volunteers of America
Volunteer Programs--School and Community
Welfare Groups
YMCA
YWCA
Zoning Boards

This list should be adapted to local participative patterns. It is not intended to be comprehensive but is presented merely as a guide to begin identifying the variety of constituencies a local school district may serve.

The school district should consider forming a long range planning steering committee to advise the long range planning coordinator and the superintendent throughout the facets of the long range plan. This steering committee can funnel information, provide ongoing feedback, assist in planning strategy and provide leadership for working committees. As the principal sounding board for the long range planning coordinator this group should be identified early in the planning process. Suggested personnel to include on the long range planning steering committee are: the superintendent, a board member, the long range planning coordinator, representation from curriculum, principals, business and other special leadership divisions, a teacher, a student, community representation. This group should not exceed eight to ten members for maximum effectiveness in the coordinating and communication functions. The members of the long range planning steering

committee may chair various ad hoc committees, or small working committees. These would meet more frequently than the umbrella committee and could broaden membership to embrace everyone who wants to work on a given task. Or, this approach could be applied to the citizen's advisory committee concept. By having working committees focus on areas of individual concern, interest in sustained and drafts of the long range plan are written. The job of editing the drafts falls to the long range planning coordinator.

The Intermediate Unit

Each intermediate unit has staff and resources to assist districts in long range planning. The availability of specialists and design of support services offered for long range planning will vary from one intermediate unit to another. Superintendents will find the intermediate unit of assistance in developing the long range plan locally by serving as resources in needs assessment, long range planning implementation, and liaison with the Pennsylvania Department of Education. The intermediate unit can assist in insuring a flexible, workable plan in accordance with the Pennsylvania Department of Education review criteria.

THE LONG RANGE PLANNING FLOW CHART

WHO DOES WHAT?

FLOW CHART OF LONG RANGE PLANNING ACTIVITIES

The flow chart on the following pages outlines the major steps involved in the completion of the Pennsylvania Long Range Plan for local school districts. The sequence was worked out during the 1974-1975 school year with cycle one districts. The sequence and timing allotted each activity can be adjusted according to each district's unique needs. The activities flow from an emphasis upon "where we are" to an emphasis upon "where we want to be in five years" and finally to formulating a plan to accomplish the district's goals and objectives. Each long range planning section is dealt with as a discrete unit and data for future projections is gathered by analyzing each completed section for trends and projected effects on the educational program. The needs assessment process is interwoven into the completion of each section and emphasizes community input.

Another approach would be to

- formulate five year projections
- define problem areas
- examine present conditions
- state desired conditions
- define acceptable standards
- prepare goals and objectives
- specify desired actions, conditions and time frame, and expected results
- implement the program
- evaluate progress toward desired conditions.

This nine step model has been used in several Pennsylvania districts with success. It requires the extracting of items from the long range plan which pertain to the various steps and while it presents a logical flow the model introduces many steps which the author considers superfluous.

The Review Council should consist of the superintendent, the long range planning coordinator, a school board member, director of curriculum, principal(s), teacher representation. Additional representation may be desired

(CONTINUED ON PAGE 112)

	AUGUST	SEPTEMBER
SUPERINTENDENT	• Notification of LRP cycle.	• Review LRP guidelines and instructions.
LONG RANGE PLANNING COORDINATOR		
BOARD OF EDUCATION		
PRINCIPALS		
FACULTY		
REVIEW COUNCIL		
COMMUNITY		
INTERMEDIATE UNIT	• Contact superintendents re: Intermediate Unit support services.	• PDE training.
PENNSYLVANIA DEPARTMENT OF EDUCATION		• Train Intermediate Unit staff new to LRP.

OCTOBER	NOVEMBER	DECEMBER
• PDE training, initial communication with board & staff re: LRP. • Appoint LRP Coordinator. • Prioritization of Ten Goals of Quality Educ.	• Form LRP review council. • Receive EQA results.	• Monthly LRP status reports to board.
• PDE training. • Prioritization of Ten Goals of Quality Educ. • Contact Intermediate Unit. • Develop LRP procedures.	• Receive EQA results. • Present LRP procedures to superintendent and administrative team.	• Gather existing goals & philosophy of district. • File and code all prioritization data.
• LRP Orientation	• Prioritization of Ten Goals of Quality Educ.	• Receive EQA results. • LRP status report.
• Prioritization of Ten Goals of Quality Educ.	• Receive EQA results.	• Prepare EQA release for faculty.
		• Prioritization of Ten Goals of Quality Educ.
		• Activate review council. • Define role and operating policy.
• EQA reporting.	• EQA reporting. • Author LRP procedures from districts including community involvement. Discuss with PDE feedback to districts.	• Coordinate workshops and on-site support services to districts in LRP processes.
• Train superintendents for current LRP cycle.	• Review LRP procedures with Intermediate Unit.	

JANUARY	- 110 - FEBRUARY	MARCH
	• Monthly LRP status reports to board. →	
• Begin data collection for Section 5: Community Involvement • Establish target dates for each LRP section.	• Organize review council sub-committees and community involvement around LRP sections.	• Synthesize prioritization data to tentative goals & philosophy. • Provide backup where nee • Begin data collection for Section 6: Administrative Unit.
• Discuss community involvement.	• Identify critical EQA goals. Adapt & publicize definition of community involvement.	• Review and approve Long Range Planning procedures.
• Prepare EQA release for public.	• Identify critical EQA goals. • Study EQA results for program implication. • Begin defining present educational program.	• Support development of sections 11A, 11B, & 11C.
• Receive EQA results.	• Identify critical EQA goals. • Study EQA results for program implication. • Begin defining present educational program.	• Begin (present) Section 11A: Educational Programs and Services; 11B: Vocational Education; & 11C: Special Education. • By building & by elem., middle school/jr. high/ high school, list present goals & school goals.
• Identify representation and suggestions for community involvement.	• Recommend LRP procedures. • Begin Section 5: Community Involvement. • Organize community involvement from board definition.	• Examine Section 5 for trends and projected effect on educational program.
	• Activate community involvement. • Prioritization of Ten Goals of Quality Educ.	• Receive EQA results. • Sub-committee composition for LRP. • Assist in data gathering from community sources.
	• Coordinate workshops & on-site support services to Prepare and distribute map 1 for Section 6.	
• Liaison with PDE. →	• Liaison with PDE. →	
• Assist Intermediate Unit and district in development of LRP in accordance with Criteria for Review.	• Assist Intermediate Unit and districts in development of LRP in accordance with Criteria for Review. →	

APRIL	MAY	JUNE
	• Deadline for public disclosure of EQA.	
• Begin data collection for Section 13: Financial Information.	• Begin data collection for Section 8: Pupil Enrollment Projections.	• Coordinate needs assessment. • Examine target dates for adjustment.
led for Sections 11A, 11B, and 11C. →		• Begin data collection for Section 12: School Facilities.
• Review tentative goals & philosophy for district.		• Board adoption of goals and philosophy for district.
→		
• Describe objectives & activities used to attain each goal for 11A, 11B, & 11C.	• List strengths & weaknesses promoting continuation/revision for 11A, 11B, & 11C.	• Examine Sections 11A, 11B, & 11C for trends & projected effect on educational program.
• Begin Section 6: Administrative Unit.	• Begin Section 13: Financial Information. • Examine Section 6 for trends & projected effects on educational program.	• Begin Section 8: Pupil Enrollment Projections. • Examine Section 13 for trends & projected effect on educational program. • Examine Section 11D: Intermediate Unit, list & describe any unmet needs & project effect on educational trends & program.
• Identify local traditions and other factors that influence educational program and project future impact.	• Input regarding district goals and philosophy.	• Determine types of needs assessment information needed.
district in LRP processes.		
• Develop Section 11D: Intermediate Unit with district LRP coordinators & superintendents	• Examine Section 11D for trends & projected effect on Intermediate Unit services.	• Distribute synthesis of 11D data to districts for local adaptation.

JULY	AUGUST	SEPTEMBER
		• Monthly LRP status reports • Project future equal enrollment policy and student attendance patterns.
•Begin data collection for Section 10: Equal Educational Opportunities.	• Begin data collection for Section 7: Staff Development.	• Collect central office and board needs assessment information.
	• Examine equal employment policy & student attendance patterns.	
•Support development of Sections 9 & 10. →		• Support development of Sec • Collect school needs assessment information.
•Begin Section 9: Educational Quality Assessment. •Re-examine EQA results in light of longitudinal test data & other needs assessment.	• By elementary/middle school/jr. high/high school, list strengths and weaknesses of each goal. List actions taken for each goal & observable results.	• Identify ethnic/minority roles/participation in curriculum, student activities & guidance. • Describe objectives & activities related to roles/contributions of minorities/ethnic groups.
•Begin Section 12: School Facilities. •Examine Section 8 for trends & projected effect on educational program.	•Begin Section 10: Equal Educational Opportunities. •Examine Section 12 for trends & projected effect on educational program.	• Examine Board/Administrative policies & procedures effecting Section 10. • Begin Section 7: Staff Development.
•Select/develop data gathering methods for needs assessment.		• Collect community needs assessment information. • Assist in data gathering from community sources.
		• Coordinate workshops & on-
		• Liaison with PDE.
		• Assist Intermediate Unit

OCTOBER	NOVEMBER	DECEMBER
to board.		
		• Examine Community Involvement and conditions promoting future continuation/revision.
tions 9 & 10. →		
•Examine Section 9 for trends & projected effect on educational programs.		• Review & analyze all data & committee reports & make recommendations for educational programs programs.
•Examine Section 10 for trends & projected effect on educational program. •Examine Section 12 for trends & projected effect on educational program. •Synthesize data from needs assessment information into usable form.	• Review Section 9. • Present needs assessment findings & make recommendations.	• Review & analyze all data & committee reports & make recommendations for educational programs.
site support services to districts in LRP processes.		
nd districts in development of LRP in accordance with Criteria for Review.		

JANUARY	FEBRUARY	MARCH
		• Organize LRP for board presentation.
• Support development of Section 11A, 11B, & 11C.		
• Begin (future) Section 11A: Educational Programs & Services, 11B: Vocational Programs & Services, & 11C: Special Educ. • By building & by elem./ middle school/jr. high/ high school list projected goals & subgoals.	• Describe objectives & activities & services to attain each goal for 11A, 11B, & 11C. • Define who is responsible for implementing projected goals, objectives, activities, & services.	Review Sections 11A, 11B, & 11C.

APRIL	MAY	JUNE
	• Release LRP for community review and approval.	
		• Prepare final LRP document.
• Board presentation for additions, deletions, corrections & tentative approval.		
	• LRP approval.	
• Assist in data gathering from community resources.	• Review and approval of LRP.	

• Coordinate workshops & on-site support services to districts in LRP processes.

• Liaison with PDE. ——————————→

• Assist Intermediate Unit & districts in development of LRP in accordance with Criteria for Review.		

AUGUST

- Submit LRP to PDE.

- Receive LRP for review.

from pupil personnel services, students, business services, community or other areas. The role of the Review Council should be defined early in the long range planning process. Generally it will provide the basis for delegation of task force work by the long range planning coordinator. It can also provide essential overall direction and articulation to the preparation of the long range plan by serving as chairpersons of sub-committees designated to complete the preliminary versions of each long range planning section. Members of the community expressing an interest in various areas of the long range plan can then constitute sub-committees. The sub-committee approach sustains interest and concentrates effort upon an area of interest to those serving on the committee. The dotted line between the Review Council and the Community on the flow chart indicates the close working relationship between the two areas. The needs assessment process can be largely drawn from community input as the public represents the schools' clients. The board of education should play a major role in needs assessment for the same reason.

Another approach to community involvement is the Citizen's Advisory Committee. Most districts in cycle one drew upon this method in some form to provide the basic aspect of their community involvement phase of planning.

Sections 9, 11A, 11B and 11C have been assigned primarily to the school staffs. This was based upon the premise that while the community, the schools' clients, are in the best position to state needs, the professional educators are in the best position to determine how to achieve the defined needs through educational programs.

The long range planning coordinator should be released half time to coordinate the long range planning effort. This person should work under the direction of the superintendent and should have major responsibility for establishing committees, arranging meetings, developing public relations materials, orientation for all committees, coordination of committee writing and data gathering, coordination of community efforts in the planning process, preparing updates for the school board, and editing of the long range plan section by section through its final board approval and submission to the Pennsylvania Department of Education.

The school board is the legally constituted body responsible for development of a workable, acceptable long range plan. All long range planning committee work is supportive of this function but is strictly advisory in nature. Regular program reports to the board of education are essential. Public disclosure and community involvement are discussed at length in Chapters 4 and 5.

REVIEW CRITERIA

The long range plan will be evaluated in accordance with specific written criteria for review. These criteria are included in the section by section narrative which follows. The goal of the review criteria is objectivity in the long range plan processing within the Pennsylvania Department of Education. Districts should be able to develop acceptable long range plans when they are aware of the review criteria from the formative stages of the planning process.

The Pennsylvania Department of Education has a "zero reject" philosophy toward the submission of the long range plans. Involvement of the intermediate unit, and where necessary, of appropriate Pennsylvania Department of Education staff throughout the stages of development of the long range plan will insure a plan which is workable and up to standard. A district would have to work at not following the guidelines to omit community involvement, intervention strategies based upon a comprehensive needs assessment and goal setting process, or other sections of the plan.

The review criteria are straightforward. They provide a guide for school districts by insuring that only the information requested is actually required in the long range plan. Reviewers will use the review criteria to evaluate the long range plan, rather than using undefined ideas and standards which could vary from one reviewer to the next. Advance dissemination of the criteria will enable districts to submit complete plans which meet all stated considerations.

COMPLETING THE LONG RANGE PLAN SECTION BY SECTION

Districts in the Capital Area Intermediate Unit felt that section by section assistance in completing the long range plan was needed. This assistance was provided in a series of workshops utilizing resource persons and in various on-site services rendered by the Capital Area Intermediate Unit staff. The material which follows represents a compilation of the input gathered from the Pennsylvania Department of Education and other sources during the course of the 1974-1975 school year. To simplify reading, appropriate portions of Long Range Planning Part I: Guidelines and Instructions, Pennsylvania Department of Education, 1974, are inserted prior to the author's explanatory comments. There are thirteen sections in Long Range Planning Part I: Guidelines and Instructions. The first four sections are broad directions which apply to completion of the remaining nine sections. They are presented first to provide background information. A section by section presentation including explanatory comments follows for sections five through thirteen inclusive.

Attachments can be added to the plans to assist the Pennsylvania Department of Education readers in gaining the total picture of a district. Be clear and concise with any attachments.

Copy which follows in Dual Gothic type face is quoted directly from Long Range Planning, Part I: Guidelines and Instructions, Pennsylvania Department of Education, 1974. Copy appearing in *Script* type face is quoted from Long Range Planning Review Criteria, Pennsylvania Department of Education, 1974. Copy appearing in Letter Gothic type face is explanatory material.

Section 1: Introduction

"Planning" is a term familiar to all school board members and school administrators. Curriculum development, purchase of supplies, recruitment, utilization of staff and construction of budgets all involve elements of planning.

The financial resources of schools are usually limited. Only through sound long-range planning can a board of education be certain that monies will be used wisely to meet the needs of complex and varied educational requirements.

Long-range planning is a logical continuous process used to determine needs and projected programs. Keeping pace with community growth and development is an important part of that process. Close cooperation and interchange of ideas should be maintained between local, county and regional planning commissions and school personnel when preparing the long-range plan.

School officials should prepare the long-range plan. School personnel should be in a position to know the types of programs needed and the facilities best suited to implement those programs. The planning activities will familiarize school personnel with many details of the school and community that will be lost if the task is delegated. Professional (i.e., intermediate units, chambers of commerce, county commissioners, state and federal agencies, planning commissions, etc.) advice and counsel should be sought at appropriate points in the preparation of the plan.

Long-range planning requires the development of a process of community and staff involvement, continuous needs assessment, new and improved ways of meeting needs and a two-way communication system between the community and the school. It implies a sincere look at what the community desires for the schools, a commitment to support those desires and a determination of how future needs are to be met. The process should help the district develop the necessary sense of direction regarding flexible use of facilities, alternative staffing patterns, continuing professional development for the staff and alternative learning situations for students.

It is recommended that such planning be based on a process similar to that set forth in A Generic Planning Process, Model and Manual - Planning for Educational Programs and Services, 1972, Pennsylvania Department of Education, Bureau of Planning and Evaluation, Harrisburg, Pennsylvania 17126. The use of the procedures suggested in this publication should contribute considerably toward preparation of the long-range plan.

Section 2: Utilization of the Plan (Objectives)

These guidelines are designed to place a greater degree of emphasis on educational programs and services and to provide a more concise format for reporting information. Each long-range plan will be used by the Pennsylvania Department of Education and the school districts to achieve certain objectives. The following are major objectives to be achieved through the development and use of a long-range plan.

OBJECTIVES

Pennsylvania Department of Education	School District
1. To assess and compare each district's projected objectives and program activities as they relate to the present status of educational quality assessment findings.	1. To provide activities that reflect the integration of the Ten Goals of Quality Education and the district's perceived goals.
2. To maintain a profile of the district's present and projected plan for educational improvement.	2. To develop and maintain a continuous and rational planning capability.
3. To provide leadership and assistance in developing and implementing educational programs.	3. To provide educational programs and services that reflect the contributions of the professional staff, students and citizens.
4. To assure equal educational opportunities for all students of the Commonwealth.	4. To provide leadership in developing and implementing educational programs.
5. To anticipate potential school district problems.	5. To provide a documentary basis for future decision-making.
6. To emphasize student needs and educational programs as the basis for site selection and construction of facilities.	6. To generate and maintain information that will give direction to the intermediate unit and the Department of Education in the area of specialized services.
7. To provide specialized services to school districts in order to improve the educational programs.	7. To provide a basis for developing a continuous information system.

Obviously, the list is not all-inclusive. However, it does establish some broad parameters for the Department of Education and school districts. The objectives may be achieved through the development and use of the long-range plan. Activities to accomplish the objectives will be dependent upon personnel, budget constraints, size and level of program implementation. They can be as varied as the imagination of those persons implementing the programs stated in the long-range plan.

Section 3: Definition of Terms

To clarify the terms used in the guidelines, the following definitions are offered to assist the school district.

1. Goal - Broad statement of educationally desirable attainment. The ultimate purpose for providing the educational program.

2. Subgoal - Statement(s) of educationally desirable attainment. Usually of lesser emphasis than the goal. Subgoals may be stated as parts of a larger goal.

3. Objective - A measurable outcome based on performance and leads to attainment of a subgoal or goal.

4. Activity - The method or approach designed to involve students, teachers, administrators, etc. in order to measure the progress toward achieving an objective.

5. Planning Capability - A school district's ability to develop and implement financial and educational activities that will lead to the attainment of their goals.

6. Specialized Services - Those services that may be requested or provided by the intermediate unit, the Pennsylvania Department of Education, private consultants and agencies or through specific state or federal grant.

7. Advisory Group - A committee(s) made up of a cross-section of the community and established to give assistance and advice to school district professional personnel.

8. Critical Goals - Those goals of the school district (educational quality assessment goals or school district goals) that have been identified as priority goals to receive the emphasis in long-range planning and program development.

Section 4: General Information Instructions

Directions for Completing Long-Range Plan

1. The "Long-Range Planning" guide is divided into two parts: Part I - Guidelines and Instructions and Part II - Forms.

2. Sections one through four of Part I are introductory.

3. Sections 5 through 13 in Part I provide a narrative explanation to complete the forms in Part II. All Part I materials should remain in the permanent possession of the school district and should not be submitted with the long-range plan. These guidelines and instructions should be read carefully before the school district begins to develop its long-range plan.

4. Sections 5 through 13 of Part II, containing the forms for preparing the long-range plan, should be completed and submitted in quadruplicate to: Bureau of Planning and Evaluation, Department of Education, Harrisburg, Pa. 17126. One additional copy should be forwarded to the local intermediate unit office.

5. Where additional pages are required to complete any section or sections of Part II, such additions should be arranged and identified in proper numerical sequence (e.g., Section 7 - Page 2; Section 7 - Page 2a; Section 7 - Page 2b; etc.). Permission is granted to reproduce any part, or parts, of the "Long-Range Planning" guide to meet individual school district requirements.

6. Special attention is directed to the information contained in Appendix C concerning the analysis of educational quality assessment data.

7. Appendix B provides optional formulas for projecting pupil enrollment.

Format for Submitting Long-Range Plan

1. Four copies of the long-range plan should be submitted. Each copy should be securely bound in a soft, two-piece cover utilizing three-hold, horizontal format (11" x 8½"). Do not use plastic or spiral binding.

2. Each section of Part II should be arranged in numerical sequence. The identifying cover sheet, (Signature Form), provided in Part II, should be completed and placed at the beginning of each copy submitted. Signatures will signify that the long-range plan has been approved by the superintendent, the board of education and the advisory committee.

3. A table of contents section (excluding appendices), similar to the sample provided for Part II, should accompany each copy of the long-range plan.

4. If questions arise, or if assistance is needed in the preparation of the plan, the school district should contact the intermediate unit office or the Bureau of Planning and Evaluation, Pennsylvania Department of Education, Harrisburg, Pa. 17126 Telephone (717) 787-7372.

Updating Long-Range Plan

1. Periodic updates of the long-range plan should be completed and submitted in the same manner and format as described above. Any update of the long-range plan (complete plan or individual sections) should contain a new signature form.

2. Updates are related to the district's three-year educational quality assessment cycle. Other updates may be made as needed or required. Each update should reflect a five-year projection.

Section 5: Community Involvement

Community involvement requires that community organizations, governmental representatives, citizen groups, district employes, students, parents or any other concerned group shall be given an opportunity to

provide information for and be aware of the contents of the long-range plan before the school board makes a final decision regarding the plan. The school board has the obligation to define what constitutes community involvement based on local considerations. It is required that this definition be made public early in the planning process to insure that every opportunity is available to all taxpayers and/or their children to be involved before final decisions are made. It is suggested that public hearings be held before submitting the long-range plan to the Pennsylvania Department of Education.

Before proceeding with community involvement and advisory groups, certain general points should be considered:

- Involve a representative cross-section (including race, age, sex and socioeconomic status) of persons concerned.

- Establish a calendar schedule for the advisory group and specific goals to be achieved.

- Establish a clear understanding as to what will happen. The advisory group should know in advance what will happen to its advisory recommendations or conclusions. Clarify the legal responsibility of the board to make final decisions.

- Keep the group on course and working to complete tasks assigned.

A program of education should be related to the aspirations and understandings of many publics if it is to receive support and efforts towards improvement.

One way of promoting community involvement in relation to the Ten Goals of Basic Education is to report the results of the educational quality assessment to the advisory groups and the entire community. Advisory planning and study committees can be developed to aid in analyzing the results, determining priorities of action, discussing a variety of ways to improve the program in order to increase the level of student achievement in the different goal areas.

It is necessary to determine what is being done in subject areas, activities and services now provided in the program. Then consideration of possible means, methods and ways to secure higher levels of goal achievement can be devised.

Members of citizen groups and interested individuals should be invited to participate in:

- Teacher workshop meetings for understanding assessment data and testing results.

- Identification of critical goals.

- Task force study sessions for the improvement of goal achievement.

Students and citizens working with teachers and administrators will be able to share convictions and be fully informed concerning new program developments related to the goals of quality education.

Item 1 - Describe briefly the district's definition of community involvement and the procedures used to make that definition public. (All documentary evidence should be kept on file in the district that verifies this item.) Indicate the media used to publicize your community involvement procedures.

The fact that this is the first section to complete speaks of its importance. Community involvement is the underlying theme in developing the long range plan. The assumption is that the public and the school district are partners rather than adversaries. In the public's interest, each district must formulate a definition of community involvement and publicly announce it. Any single aspect of the media only gives partial coverage. It is important that the district take the broadest media approach possible for announcement and recruitment of community involvement. The essential thing to consider is provision of opportunities for all persons to be involved at some phase, if they so desire. Persons may come as individuals, sit in on board or committee meetings, express their concerns, work actively on committees preparing the long range plan, complete needs assessment activities, etc. Public input is essential to a meaningful long range plan.

Item 2 - Describe briefly the process by which the composition of the advisory committee(s) was determined and how the representative(s) were recruited.

The latitude for community involvement is quite wide Chapter 4: "Community Involvement in Long Range Planning," and Chapter 5: "Communicating Educational Quality Assessment and Other Needs Assessment Results with the Publics a School Serves," include suggested activities for community involvement in long range planning. Ninety-five percent of the school districts in the United States have some form of community involvement at present. This figure includes formal and informal programs ranging from volunteers and PTA to Title I and vocational education advisory councils. Districts are not being asked to do anything new. They are merely being asked to formalize their relation with the public in a two way communication process. By involving the public, districts will obtain better needs assessment data, gain understanding of the limitations and resources available to achieve desired goals, and become familiar with the dynamics of the school district.

Any systematic recruitment plan formulated in good faith to increase community involvement above its present level in the district is acceptable. Every attempt should be made to provide balanced community input.

Item 3 - List name, address and group or agency represented by each advisory committee member.

While community involvement procedures are left to the discretion of the individual school district, a genuine attempt should be made to embrace all definable publics served. On the other hand, not everyone who wants to serve on a committee needs to be selected. Districts can select committee members, questionnaire samplings, lay leaders and so on according to local needs. Persons unable to be included on committees might wish to be kept on a mailing list to receive information regarding progress of those areas of the long range plan which interest them.

The purpose of this list is protection of the district from disclaimers of the type of community involvement used in any given instance. When districts are asked to document the involvement from its inception, and to provide some vehicle for everyone who wishes to have some input, disclaimers will arise only from lack of information rather than from a valid lack of opportunity.

The means by which community involvement is achieved is entirely up to the local school district. Long range planning steering committees, superintendent's advisory committees and citizen's advisory committees are some of the approaches which might be used to achieve community input. The membership of these committees is determined by the local district and can vary from invitation of selected citizens, to the inclusion of teachers, administrators, students, groups active in the community, and individuals who volunteered, to random selection technques.

Item 4 - List the dates and general subject of each meeting. (All documentary evidence should be kept on file in the district that verifies this item.)

If questions arise regarding community involvement, work through the intermediate unit and the Pennsylvania Department of Education to determine the appropriateness of the plans your district is developing for community involvement. The overall objective is zero rejects on long range plans. This will occur where an honest effort has been made to make the plan acceptable and to involve the publics the school serves in spite of difficulties a district may have encountered in achieving this involvement.

The dates and general topic of each meeting are all that is required in item 4. Backup data should not be attached to the report but rather kept on file in the district office.

Dates and topic should be recorded for all types of community involvement related to long range planning whether this is in an open board meeting, as part of the agenda of civic or school organization meetings, or a planned committee or sub-committee meeting.

Item 5 - Describe briefly those conditions that are prompting continuation or revision of the present process of community involvement.

Community involvement is a process itself as well as considering it as part of long range planning. Ongoing advisory groups and specific committees required that their roles be clearly defined. For example, will the committee be dismissed once the job of long range planning is over? It is important to establish a climate where people feel comfortable to be involved in the committee work, but involvement should not be forced. School personnel serving on the committee or as liaison to it, should report on an ongoing basis to the members of the advisory committee regarding the problems, suggestions and needs the committee has and what has been done about them. Each district's experiences with community involvement during the long range plan preparation will point to conditions indicating continuance or revision of present community involvement policies and procedures.

Item 6 - Describe briefly the projected plans for involving the community.

It is also critical to include implications for future community involvement in the long range plans. The objective of community involvement as the basis for long range planning is the establishment of this dialog as an ongoing function in school districts. Future plans should be based upon conditions identified in item 5 as well as specifics regarding target groups and extent of future community involvement.

The following criteria will be used as the basis for examining "Long Range Planning Section 5: Community Involvement" by Pennsylvania Department of Education personnel.

Section 5
Community Involvement

Item 1 - Is the district's definition of community involvement reported?
- Are the procedures for publicizing the definition reported?

Does the description indicate which media was used and when?

Item 2 - Is the process for determining advisory committee composition reported? Does the description indicate how the composition was determined, i.e., open meeting, existing body, administration/board decision, etc.?

- Is the process of recruitment reported?

Item 3 - Have the names, addresses and group affiliation of all committee members been reported?

- Does the list include representation of students, parents, citizens and district employes?

- Does the list include representation of community organizations, government agencies and the intermediate unit?

Item 4 - Are the dates and subjects of each meeting reported?

Item 5 - Are the conditions prompting continuation, or revision, of the present method of community involvement described?

Item 6 - Have the projected plans for involving the community been described?

- Does this description show a relationship to the conditions described in Item 5?

- Does the description indicate the intent of any future involvement?

- Does the description indicate which represented group will be involved?

- Does the description indicate how (i.e., advisory body, open hearings, surveys, etc.) and to what extent (i.e., after the fact, preliminary to decisions, advice, etc.) the community will be involved.

Section 6: Administrative Unit

A summary description of the administrative unit is valuable for those persons involved in the development and implementation of the plan. The following information is important and necessary to assess the present and projected status of the school district.

This section provides the reviewers of long range plans with background information related specifically to an understanding of each district. The information noted indicates areas of importance to the district and thus provides insight into some of the local priorities and problems.

Item 1 - Give the number of graduates from the most recent graduating class.

This information provides data regarding the size and type of high school(s) and of the district. If there is more than one high school in a district, a breakdown of graduates per building would be helpful. Form DEAS-21, Public Secondary School Report, may provide data for this item.

Item 2 - Approximate, as nearly as possible, the per cent of graduates that remain in the community (average of last three years).

A follow-up of graduates is essential for a meaningful educational program. This item presents a good opportunity for guidance personnel to contact the community. A form letter or questionnaire should be developed and recent high school graduates should respond. The survey can be mailed, conducted by telephone, consist of random interviews, or employ other appropriate methods. Middle States Association follow-up data may be used if it is current.

The further the distance in time from leaving of school, the more objective the information will be. Questions should be directed at program strengths rather than personnel. Sample questions might be, "Was the educational program you took meaningful?" "What were the courses you felt were most useful?" "How did your coursework relate to college, work, to life experiences?"

Item 3 - Approximate, as nearly as possible, the per cent of graduates that go on to post-secondary educational opportunities (average of last three years).

All types of post-secondary programs are included in this item, nursing school, technical training, two and four year colleges. Districts should consider the relationship of students going on for further study to the curriculum offered in the high school. Are students adequately prepared for their post-secondary goals and studies? A study of the types of post-secondary studies pursued by students and their reasons would be very helpful to a high school in updating the curriculum. Form DEAS-21, Public Secondary School Report, may be of assistance in completing this item.

Item 4 - Approximate, as nearly as possible, the per cent of graduates from post-secondary education programs that return to the community (average of last three years).

This information should be as factual as possible. The follow-up survey mentioned in item two will assist in determining the most accurate figure. Items one, two, three and four can be presented on a chart basis giving an overall look at one glance as to the status of graduates in a district.

If a student lives at home but goes to college most of the year, he is considered a member of his home community for this study. Students who commute out of town to jobs should also be counted as residents. If the information is available, it may be of interest to note whether students move out of state, one hundred miles away, thirty miles away, remain locally, or whatever criteria is desired.

Item 5 - Describe briefly the geographical features, topographical features and the relationship of these to the surrounding region. Relate this data to its effect on the educational program.

Climate, geography, topographical features, etc. relate to transportation costs and needs, to the type of curricular and extra-curricular offerings, and in extreme cases to major considerations in educating a community's youth. For example, a district in Susquehanna County sends elementary students to New York State on a tuition basis rather than bus them over mountainous roads in the snow to their own school which is distant compared to the New York school. Considerations such as size, rural or industrial land use, isolation from cities and transportation centers should also be noted. Some districts must pay isolation stipends in order to get qualified teachers.

Item 6 - Discuss briefly the local traditions and factors that have effected the present educational program and project the effect that will have on future educational programs in the school district.

Cultural and ethnic considerations are among the factors to include in this item. Foreign language offerings, transfer of large numbers of parochial pupils into the high school program from their own K-8 program, tailor-made programs such as trade training by indigenous people for Amish students should be mentioned. In addition consider the contributions various traditions and groups make to the enrichment of the educational program. Preserving local heritage is a proper role of the curriculum. There is room for various groups to retain their culture while others gain a greater appreciation of it. Present

and future impact of traditions and other local factors should be noted in this item.

Item 7 - Facsimiles of the following maps may be found in Appendix A. Similar maps should be submitted with this section. Please use the pagination for each map as shown in the examples. The maps are as follows:

Map 1 - County map which shows the school district location. (Pagination is: Section 6 page 4.)

Map 2 - School district map showing political subdivisions, major roads, school locations, railroads, rivers and other pertinent data. (Pagination is: Section 6 page 5.)

Map 3 - Elementary pupil population distribution. This should be public and nonpublic. (Pagination is: Section 6 page 6.)

Map 4 - Secondary pupil population distribution. This should be public and nonpublic. (Pagination is: Section 6 page 7.)

Maps used in the prior long range plans can be updated and used. All maps should be eight and one-half inches by eleven inches or fold to that size. Five copies of a uniform "Map 1" may be provided by an intermediate unit for all districts it serves.

Maps 2 and 4 should be coded to reflect public and nonpublic enrollment. For example "2 - 1" in a square would mean two public students and one nonpublic student reside in this grid. Any code used should be clearly marked on each map in a key. The scale may be any size necessary to fit the district legibly on a page. This should also be noted in a key. These maps will show the population centers and transportation considerations in each district.

The following criteria will be used as the basis for examining "Long Range Plan Section 6: Administrative Unit" by Pennsylvania Department of Education personnel.

Section 6
Administrative Unit

Item 1. Does the plan give the number of graduates from the most recent graduating class?

Item 2. Does the plan approximate the per cent of graduates who remain in the community? (This figure should reflect a three-year average.)

Item 3. Does the plan approximate the per cent of graduates who go on to post-secondary educational opportunities? (This figure should reflect a three-year average.)

Item 4. Does the plan approximate the per cent of post-secondary education graduates who return to the community? (This figure should reflect a three-year average.)

Item 5. Does the plan describe and relate geographical features, topographical features and regional relationships to the district's educational program.

Item 6. Does the plan adequately describe local traditions and factors and relate these to the present and projected educational programs?

Item 7. Does the plan contain all necessary maps containing required data and information? (Maps 1 through 4, Appendix B)

Section 7: Staff Development

The improvement of educational services to the children of the Commonwealth depends upon the quality of skills and attitudes of those providing the services, whether they are teachers, counselors, librarians, custodians, administrators or others. It is extremely important for boards of directors to ensure that the above and all other persons in the schools have both the encouragement and opportunity to continually improve in professional competencies. The following items should be completed to provide an accurate picture of what is happening now with staff development in your district and what is planned for the future:

Professional and non-professional staff should be considered throughout this section. The assumption underlying this section is that all staff members should have in-service growth opportunities in which to participate at some time. All types of staff development should be embraced in the items below including: one day training, planned courses, formal or informal programs, supervised on the job training, district sponsored, intermediate unit sponsored, those run by consultants, intermediate unit staff, district personnel, colleges, etc.

Item 1 - Indicate the different groups of staff members from your district that participate in staff development programs administered by the intermediate unit?

Item 2 - Indicate the different groups of staff members that participate in school district administered staff development programs?

All staff groups served must be noted. A district may wish to include the number of staff members in each group served. The responses to Items 1 and 2 will vary considerably from one district to another because of differing needs and staff sizes.

Item 3 - Please describe the needs assessment plan or strategy employed by your district to determine staff development programs. Also, please project the type of needs assessment plan which you will employ to ensure that each employee has the opportunity for self-improvement.

This item indicates the rationale for the staff development program in operation. It should explain how a district determines whether the present staff development program is meeting staff needs. A wide degree of variance is permissible in needs assessment. Informal methods such as interviews, suggestion boxes, and supervisors' suggestions or formal methods such as interest surveys and questionnaires, planning committees to determine consensus of needs, discrepancy analysis or summarization of needs noted on performance ratings may be used independently or in conbination.

Item 4 - Please describe staff development programs in which you are involved under intermediate unit auspices (Item 1). Please project those staff development programs which the intermediate unit will be providing in the future.

A brief narrative describing the program is adequate. The methods by which the intermediate unit and local district communicate regarding in-service programs should be included. In the case of the Capital Area Intermediate Unit the in-service council, curriculum council, superintendent's council, in-service newsletter, and individual contacts from districts to the intermediate unit all represent formalized channels of communication between districts and the intermediate unit regarding staff development program availability and planning. While the intermediate unit conducts an independent staff development needs assessment each year, the projection called for in this item refers specifically to staff development programs which a district wishes the intermediate unit to provide in the future. These needs will vary from one district to another. The Capital Area Intermediate Unit stands ready to develop programs on an intermediate unit wide basis where commonality of need arises, or on a district by district basis where needs are unique. This posture is representative of the in-service support in the twenty-nine intermediate units in Pennsylvania.

Item 5 - Please describe the staff development programs which are initiated and administered solely by your district (Item 2). Please project the staff development programs which the school district will be providing in the future.

This item covers the same areas as number four with emphasis upon the local district rather than the intermediate unit.

Item 6 - Please indicate your present and projected plan for providing staff development programs that will be coordinated through the regional in-service council.

The Capital Area Intermediate Unit coordinates the regional in-service council. Members represent teachers, administrators, citizens, parents, board members, and pupils throughout the intermediate unit. Each district also has designated a professional staff member to serve as intermediate unit service liaison to the intermediate unit. The local district response to item 6 should focus on the communication it provides to the regional in-service council and to the in-service liaison person.

In other words, this is the district plan for requesting service through the regional in-service council. In many cases the regional in-service council is not contiguous with the intermediate unit in-service council. Information regarding the regional in-service councils approved by the Pennsylvania Department of Education is available from the Bureau of Curriculum Services, In-Service Unit.

The following criteria will be used as the basis for examining "Long Range Planning Section 7: Staff Development" by Pennsylvania Department of Education personnel.

Section 7
Staff Development

Item 1 - Does the plan indicate those groups that participate in in-service programs administered by the intermediate unit?

Item 2 - Does the plan indicate those groups that participate in in-service programs administered by the local district?

Item 3 - Are the current in-service programs based on an existing needs assessment plan? Does the projected staff development needs assessment program identify the needs of each employee or group?

Item 4 - Is the district involved in staff development activities which are under intermediate unit auspices (Item 1)? Has the district projected its future programs for staff development?

Item 5 - Is the district involved in staff development activities which are initiated and administered solely by the district (Item 2)? Has the district projected staff development activities that ensure that all staff members will have opportunities for self-improvement?

Item 6 - Does the plan show a definite effort on the part of the school district to become involved with a regional in-service council for staff development?

Section 8: Pupil Enrollment Projections

The projection of pupil enrollment is a basic requirement of any plan to determine the needs for a complete educational program and the facilities needed to implement that program. If a nongraded program is in operation, the projections must be based on chronological age groups. See Appendix B for several recommended methods of projection.

Before pupil enrollment projects are made, certain community factors should be considered and analyzed, such as:

- Kinds of business and industry in the community and any apparent trends that will affect pupil enrollment for the district.
- Kinds of public transportation in the community that will affect pupil enrollment.
- The types of opportunity for employment within the community or any anticipated changes in the employment structure for the community
- The types of housing (i.e., single unit, multiple unit, apartments, etc.) and any changes that appear imminent.
- The significant population mobility within the district.

Item 1 - This is the enrollment data form. Using the most recently completed school year prior to the submission date as your base, enumerate enrollment by age group for the previous five years and project the school district enrollments for the next five years.

This section provides the basis for determining the number of learning stations the state will allow a given district for reimbursement when a building program is undertaken. The five year pupil enrollment projections may be based upon census data, third day enrollment figures, or local district policies for projection. Consistency from one year to another is the essential element in providing a realistic data base. Projections can be computed in many ways. The Long Range Planning Part I: Guidelines and Instructions, Appendix B details methods for projecting school district enrollment based upon historical assumptions for the rate of change. The methods shown include: crude enrollment rate, general enrollment rate, the age-specific enrollment rate. Other methods may also be applied to include retention factors, building growth, birth rate, etc. To determine the trend with a reasonable degree of accuracy, data must go back ten years. Twenty years would provide an even firmer basis for projections. Future plans of the non-public schools must be taken into consideration also. Is a parochial high school about to close? Do a large number of parochial students transfer at the end of grade eight? Is tuition going up in the non-public schools to the extent that students are transferring to public schools?

Special education enrollment can be included under "Remarks" for item 1. Or, it may be absorbed in the graded totals. In the latter case, note should be made of this under "Remarks" for item 1.

Districts may find they are planning building programs where enrollment is declining. Graduates may be exceeding the number of replacements but older buildings require replacement; or, consolidation of smaller schools may be necessary. Reexamination of district needs may prompt reorganization of the grade grouping into a new middle school requiring a building program, renovations, or additions.

Since the passage of the Act 34 (the Taj Mahal Act) citizens are particularly interested in the basis for projecting enrollment. Nationally a plateau has been reached in pupil enrollment. This awareness creates an interest in the use of local enrollment trends as justification for building. Under this act, renovation costs are not included. This is causing many districts to re-evaluate the possibility of renovating existing buildings. Additions exceeding twenty percent of an existing building do come under the Taj Mahal Act. This means the district must hold a public hearing before filing construction plans with the Pennsylvania Department of Education. If the cost of new construction exceeds the total cost of the building at that time, the district must hold a referendum on the new construction. Various rule of thumb considerations used by the Pennsylvania Department of Education in evaluating proposed building projects also should be considered. For example, eighty-five percent utilization of a station is usually considered as the basis for an alternate bid. There is no longer a penalty for classrooms under standard size. This further causes districts to consider renovation to revitalize existing schools without worrying about limitations of cost. The Taj Mahal Act provides an aggregate building expenditure standard for elementary, junior high, and secondary buildings. This standard is adjusted annually depending upon the composite construction cost index. Form DEAS-143, Summary of Enumeration of Children for the School Year, may be of assistance in completing item 1.

Details regarding Act 34, are available in Basic Education Circular 61-75, Basic Education Circular 136, and Reprints of Senate Bill 8, Act 34 of 1973. Guidelines for implementing Act 34 of 1973 are detailed in the Basic Education Handbook code 62-100.

Item 2 - Describe the present status regarding pupil transfer to and from non-public schools. Include numbers of children, frequency of transfers and types of transportation. Project future trends that are evident with regard to these transfers.

This item is a recap in consolidated form of transportation of non-public students. The number of students and methods of transport (district-owned bases, contracted buses, fare provision,

private car, taxi, etc.) are to be reported. Transfer of pupils from public to non-public status should be examined and the present status and future impact described.

The following criteria will be used as the basis for examining "Long Range Plan Section 8: Pupil Enrollment" by Pennsylvania Department of Education personnel.

Section 8
Pupil Enrollment

Item 1 - Preschool census figures for the previous five years are realistic and correlate with present grade enrollments.

- The present term enrollment figures (including preschool census by age) is completed.

- The projected enrollment figures reflect a realistic and acceptable increase or decrease of pupil enrollment.

Item 2 - The non-public pupil enrollment is completed and correlates with the preschool census data and present enrollments.

Section 9: Educational Quality Assessment

Each school district, in developing or updating a new long-range plan, shall use the Ten Goals of Quality Education as a basis for developing district goals. Additional goals and/or sub-goals may be added to the listing for the purpose of developing the long-range plan.

The services of the educational quality assessment program have been available to school districts on a voluntary basis during the past several years. It is now required that each school district participate in the program. The program provides that each district shall be involved every third year in assessing grades five, eight and eleven.

The results of the educational quality assessment shall be used as a primary source of information for the district to assess its present efforts toward achieving the Ten Goals of Quality Education. This information shall also be given primary consideration in determining future programs and services.

Item 1 - State the most recent year that the school district participated in the educational quality assessment program.

Item 2 - List by goal number, the strengths and/or weaknesses in student performance that were indicated by the assessment findings. (See Appendix C, Analyzing educational quality assessment information.)

Local districts are referred to Chapter 7: "Where We Want To Be: Prioritizing District Goals," for details regarding analysis of Educational Quality Assessment information. This material can be obtained from the Capital Area Intermediate Unit or from Research and Information Services for Education. Included are methods for prioritization based upon the school status report and upon ranking goals in educational philosophy, a flow of events for prioritization, prioritization instruments, and supplemental references. Manual Two: Suggested Methods for the Identification of Critical Goals, 1975, published by the Pennsylvania Department of Education, presents information in the same general areas which will assist local districts in completing item 2. Strengths and weaknesses can be identified by individual building. Districts are encouraged to apply in depth evaluation procedures to supplement and aid in the interpretation of the Education Quality Assessment results.

The Pennsylvania Department of Education will look for an awareness of strength and weakness in relation to what a district is trying to do about them, rather than placing value judgments on needs or intervention strategies.

It is important to note that local district goals may be included in developing the long range plan.

Item 3 - List by goal number, the actions you have taken to improve student performance on one or more goals.

Goal Number	Action Taken	Observed Results

Chapter 8: "Planning How To Get There: Organizaing Curriculum Around District Goals," will assist districts in applying Educational Quality Assessment to the curriculum development process as indicated in item 3. The Pennsylvania Department of Education is developing a series of guides to intervention strategies for each of the Ten Goals of Quality Education. In addition, Manual Three: Construction of a Plan of Action is projected from the Educational Quality Assessment office as a sequel to Manual One and Manual Two. Research and Information Services for Education and intermediate unit offices have materials which will assist districts in determining intervention strategies for areas of weakness. Changes observed in students should be documented by goal. This data can be summarized for item 3.

Districts should think in terms of Goal Number, Planned Program or Action, Projected Results for a more adequate interpretation of item 3.

Item 4 - List any unmet needs that may require the assistance of an agency other than the district to improve one or more goals.

Communication with the intermediate unit can be of assistance in providing follow-up for the areas identified in item 4.

Educating the public, teachers, administrators, etc. regarding interpretation and subsequent application of Educational Quality Assessment is a major need. Concentration upon this area can bring people closer to their responsibilities and clarify their roles in improving the quality of education in the district.

The following criteria will be used as the basis for examining "Long Range Plan Section 9: Educational Quality Assessment" by Pennsylvania Department of Education personnel.

Section 9
Educational Quality Assessment

Item 1 - Does the plan:

Contain the year of assessment?

Identify the grade levels assessed?

Item 2 - Have the strengths and weaknesses in student performance been identified according to the procedure outlined in Appendix C (Analyzing EQA Information)?

Item 3 - Have the observed changes been identified?

Item 4 - Are the listed needs specific enough to focus effort?

Section 10: Equal Educational Opportunities

One of the priorities of the Pennsylvania Department of Education is the assurance of equal educational opportunities for all persons within the public education system. The long-range plan should reflect the district's efforts toward achieving equal opportunities and serve as a way of documenting these efforts.

The detailed directions for this section have minimized the need for explanatory comments. Where appropriate, further information has been provided below. Section 10 attempts to identify possible instances of racial isolation and pupil distribution in various curricular and extra curricular programs as well as employment procedures and counseling.

Item 1a - Provide pupil enrollment statistics by race/ethnic group by building for the current school year and the fifth year of the plan. Include data for each building, grade level organization and total district by group. Also include percentages for black enrollments.

The Equal Educational Opportunities Office does not require districts having fewer than one hundred minority pupils to complete items 1a, 1b, and 1c. Not only are chances of racial isolation slim in such districts, but this item would become merely an exercise rather than a meaningful examination of pupil distribution. The total equal opportunity picture is now considered to include in addition to race and ethnic group, matters of discriminatory patterns in extra-curricular and athletic activities, provision of bilingual education for English as a Second Language students, balanced curricular offerings, equal counceling practices and related areas. Form DEAS-1059, Public School Enrollment Report, may be of assistance in completing this item.

Item 1b - For proposed new buildings and those where changes in status or use are proposed, i.e., additions, abandonments and conversions (e.g., change from an elementary to a middle school), provide race/ethnic data (Form 1b) for the year of change or opening. In such cases, also include data for existing facilities whose enrollments will be affected by the opening, closing, addition or conversion.

Item 1c - The prime consideration here is planning for the elimination or prevention of de facto segregation or racial isolation. Identify any existing problems or racial isolation and project a plan for the elimination or reduction of these problems. Respond in terms of one of the following categories:

- No significant enrollment of minority race pupils.

- There is a significant enrollment of minority race pupils, which is distributed by building within an approximate ± thirty per cent variation of the district's minority race enrollment percentage per grade span, i.e., elementary, middle/junior high and high school. (Example: The district's elementary minority race enrollment percentage is twenty-five per cent. Using the recommended ± thirty per cent variation, the district's minority race enrollments may vary from eighteen per cent to thirty-three per cent.)

- Minority race isolation does exist within the district but plans are projected for its elimination and justification is provided in terms of time, distance and/or relationship of the number of minority and majority pupils.

Item 2a - Describe the present and projected district policies and practices for recruitment and promotion of minority and women employees, both professional and nonprofessional. All districts should develop an affirmative action plan and state its contents under the projected program and practices column. Each plan should include:

- Statements of district philosophy, policies and practices regarding the recruitment, employment and promotion of minorities and women.

- Specific steps to be followed to implement the plan, e.g., staff recruiting, responsibilities, resources to be used (including colleges and universities, community groups and employment agencies) and recruiting techniques.

Affirmative action is not a quota system. Local districts meet this requirement by providing equal opportunities for employment and supporting this with personnel policies and a rationale. Affirmative action implies the district will do something it has not done in the past. In most cases local districts can practice affirmative action most appropriately by broadening the scope of the contacts made to increase the diversity of the applicant pool. Over a period of time, the applicant pool will then become more representative of the general population in terms of minority staffing in general and in terms of women in administrative positions, men in primary teaching roles, or whatever the defined need may be. Item 2 is the appropriate place to indicate what action the district is taking to insure greater diversity of the applicant pool. Advertising positions in journals having wide circulation as well as specific readerships and making direct college contacts for specialized recruitment are examples of activities a district might undertake to implement affirmative action.

Once the applications are received for an advertised position with clearly stated qualifications and job responsibilities, the best qualified person should be hired purely upon merit related to the ability to perform.

Item 2b - Numerical objectives to be achieved for each category of employees during the life of the plan. (These objectives should be reflected in the charts in Section 10 - pages 6 and 7.) Progress on the objective should be examined frequently in terms of attainment and good faith effort. Any revisions should be included in updated plans along with justification. Provide present and projected staff employment statistics for professional employees by race and sex.

"By building" will not apply to this item according to a memorandum now in preparation at Equal Educational Opportunities,

Pennsylvania Department of Education. Form DEAS-616, Professional Personnel Record-New Employees Report, may provide data applicable to item 2b.

Item 2c - Provide present and projected staff employment statistics for nonprofessional employees by race and sex for each of the employment categories indicated in Section 10 - page eight. (Note that the nonprofessional employees figures are not required by building.)

Form DEAS-408, Report of Employees Other Than Teachers and Administrators, may provide useful information for item 2c.

Item 3 - The inclusion in curriculum of content and materials regarding the history, contributions and roles of minority racial/ethnic groups and women is a component of quality integrated education. Describe the projected objectives and activities at the elementary, middle/junior high and high school levels for this component. Consideration should be given to each of the program areas in Section 11a.

Pennsylvania Department of Education publications which may be helpful in reviewing district curriculum related to item 3 include:

a) Equal Rights: An Intergroup Education Curriculum, 1974.

b) Images of Women, 1973.

c) Training the Women to Know Her Place: The Social Antecedents of Women in the World of Work, 1973.

d) Self-Study Guide to Sexism in Schools, 1974.

Item 4 - A second component of quality integrated education is the opportunity for students of both sexes and from all racial/ethnic groups to participate equally in all school-related activities. Prime consideration here is the elimination of over-concentration of students of one sex or minority racial/ethnic group in any one activity, other than those approved by the State Board of Education. Describe present patterns of participation and project the district's objectives.

The response to item 4 should take compliance with recent court rulings and Health, Education and Welfare guidelines into consideration.

Item 5 - A third component of quality integrated education is a guidance counseling program responsive to the needs of all students. Prime consideration here is the elimination of discrimination and stereotyping in grouping, course selection, testing and career or post-secondary education choices. All students should be encouraged to consider seriously all programs of study and to make choices based on their interests and talents not based on their race or sex. From this point of view, describe the present counseling program's strengths and weaknesses and projected objectives.

A small study group can prepare item 5 by examining counseling practices and by following up minority and women graduates to determine what they are doing. Perhaps few black students go to college or many drop out before high school graduation. Perhaps male and female graduates are entering traditional fields and feedback indicates girls wish they had gone into architecture or autobody work, or boys are interested in nursing. A career-educational program to broaden the horizons of all students, new course offerings, internship programs in professional or vocational areas, etc., can then be evaluated for their appropriateness in meeting any needs the follow-up study has defined.

Item 6 - The success of the preceding components depends upon board and administrative policies and practices. This section should include an examination of present and projected policies and practices which affect student participation and achievement, such as:

- Policies and practices which encourage participation of minorities and female students in programs and activities.
- Policies and practices which ensure that disproportionate penalties to members of any one group do not occur; e.g., suspension policies.
- Policies and practices which support program objectives as projected in items one through five of this section.

The following criteria will be used as the basis for examining "Long Range Plan Section 10: Equal Educational Opportunity" by Pennsylvania Department of Education personnel.

Section 10
Equal Educational Opportunity

Item 1 - The present and projected pupil enrollment statistics by race/ethnic group by building considers community population trends and the impact of any school construction or pupil distribution. (Section 10 - pages 1 and 2)

- *Projected interim building changes show the impact on other buildings and the projected racial/ethnic pupil enrollment as a result of the intended changes. (Section 10 - page 3)*

- *The plan identifies existing problems of racial isolation and projects various means of preventing or eliminating the problems. (Section 10 - page 4)*

Item 2 - *The plan includes present and projected information regarding the school district philosophy, policies and practices for the recruitment and promotion of minorities and women. The plan should reflect: discovery of resources, initial employment practices and promotion. (Section 10 - page 5)*

- *The plan identifies present and projected staff employment statistics by building, race/ethnic group and sex. The plan takes into consideration the analysis of current staffing patterns, identification of areas of critical need, future staffing needs and availability of personnel. (Section 10 - pages 6, 7, and 8)*

Item 3 - *Does the plan project objectives and activities regarding minority racial/ethnic groups and women for the elementary, middle/junior high school and senior high school? (Section 10 - page 9)*

Item 4 - *The plan includes present patterns of participation in activities and projects the district objectives for the inclusion of students by racial/ethnic group and sex. (Section 10 - page 10)*

- *Unacceptable patterns of participation are being eliminated as a result of projected objectives. (Section 10 - page 10)*

Item 5 - *The information describes the present counseling program, identifies strengths and weaknesses and projects the objectives designed to eliminate the weaknesses of the program. (Section 10 - page 11)*

Item 6 - *The plan specifies present board and administrative policies and practices that support or hinder equal educational opportunities as they relate to items one through five. (Section 10 - page 12)*

- *The plan projects changes and/or additions to board and administrative policies and practices that support equal educational opportunities as they relate to items one through five. (Section 10 - page 12)*

Section 11A: Educational Programs and Services (Goals, Objectives and Activities)

Each district is responsible for developing programs and services that will implement the district's goals and the Ten Goals of Quality Education. A statement of the present and projected goals or subgoals, objectives and activities (programs and services) to accomplish these goals shall be given for the elementary, middle/junior high and senior high. These goals and subgoals should stress general program and services concerns and not individual courses, subject matter or materials.

The goals, objectives and activities should be written in parallel form so that each goal or subgoal has a corresponding objective and activity or activities. In addition future program projections should indicate who is responsible for implementing each proposed activity (i.e., central administration, building principal, pupil personnel services director, math teachers, etc.).

Careful consideration should be given to the widest variety of activities that can be used to attain the goals and assure equal opportunities for every child regardless of race, sex, academic standing or career choice. The activities should reflect broad aspects of the basic curriculum (communications, fine and practical arts, natural and social science, mathematics, health and physical education), special education, pupil personnel services, vocational education, media services and field experiences. While these activities should not be highly specific, there should be sufficient information to indicate how the elementary, middle/junior high and senior high programs and services relate to each goal or subgoal.

As projected goals, objectives and activities are being considered, some indication should be made regarding those identified strengths or weaknesses that suggest either continuation or revision of the goal, objective or activity. A concise statement immediately following each present goal, subgoal, objective or activity could indicate those specific strengths or weaknesses prompting proposed action.

NOTE: There may be a few districts where wide variance exists among the schools and their communities at the elementary, middle/junior high or senior high levels. Such variance may require schools within a particular level to be considered and reported separately rather than considered as part of a composite. If this is the case, those schools that reflect this diversity should be treated separately when recording goals, objectives and activities.

Item 1 (Elementary) - List the present goals and subgoals for the elementary level. Describe the objectives and activities being provided to attain each goal or subgoal. Indicate those specific strengths or weaknesses that are prompting the proposed continuation or revision.

Item 2 (Elementary) - List the projected goals and subgoals for the elementary level. Describe the objectives and activities or services that are proposed to attain each goal and subgoal. Indicate who will assume responsibility for implementing each projected activity.

Item 3 (Middle/Junior High) - List the present goals and subgoals for the middle/junior high level. Describe the objectives and activities or services being provided to attain each goal or subgoal. Indicate those specific strengths or weaknesses that are prompting the proposed continuation or revision.

Item 4 (Middle/Junior High) - List the projected goals and subgoals for the middle/junior high level. Describe the objectives and activities or services that are proposed to attain each goal and subgoal. Indicate who will assume responsibility for implementing each projected activity.

Item 5 (Senior High) - List the present goals and subgoals for the senior high level. Describe the objectives and activities or services provided to attain each goal and subgoal. Indicate those specific strengths or weaknesses that are prompting the proposed continuation or revision.

Item 6 (Senior High) - List the projected goals and subgoals for the senior high level. Describe the objectives and activities or services that are proposed to attain each goal and subgoal. Indicate who will assume responsibility for implementing each projected activity.

School performance has been measured for each of the Ten Goals of Quality Education adopted by the Pennsylvania Department of Education. The strengths and weaknesses noted by Educational Quality Assessment should be examined in light of the district goals developed for their long range plan. District goals may be added to the Ten Goals of Quality Education. Next, schools must determine which goals seem most critical. This material will be the product of the prioritization process described in detail in Chapter 7: "Where We Want To Be: Prioritizing District Goals." Once the critical areas have been determined, districts plan implementation of intervention activities on a district-wide or building by building basis. For each goal, documentation should be kept regarding the manner in which objectives are met and the specific activities which lead to the attainment of the objectives.

Persons wishing specific assistance in goal, objective, and activity writing should contact their intermediate unit office. Resources are available in the form of personnel and materials to assist districts in this phase of long range planning.

A course syllabus should not be attached to Section 11A. Only the broad program goals are needed. Be certain to include personnel responsible for implementing the program activities on the long range planning forms. Prepared objectives may be used directly when they apply to a district's program, or they may be adapted to fit. Some type of criterion referenced testing should be considered to monitor progress in problem solving areas. The Pennsylvania Department of Education has prepared a sample page for one goal indicating the broad type of objectives and activities desired. This sample page is included for reference purposes.

The Manheim Township School District format for completing "Section 11A: Educational Programs and Services," is provided as a sample. Districts may wish to adapt this format based upon local considerations.

Section 11A: Educational Programs and Services (Goals, Objectives and Activities)

ELEMENTARY/SECONDARY

1. Goals and Subgoals	Objectives	Activities
1. Increase all students' interest in school. (s)a. Increase student interest in the academic program and the elective offerings of the curriculum. (s)b. Increase student interest in cocurricular activities of the school. (s)c. Increase student interest in the interscholastic program sponsored by the school. (e)(s)d. Increase student interest and participation in theatrical and musical activities sponsored by the school. (e)e. Increase student interest and involvement in physical activity programs. (e)f. Improve and increase student involvement in the student government activities of the school.	1. Increase the number and per cent of student involvement and interest the school activities and offerings (a) 1. Have 30% or more of the students electing courses outside of the required curriculum. 2. Provide in-depth counseling for all students in the school. 3. Add and/or delete at least one course offering each year. (b) 1. Have 50% or more of the students participate in cocurricular. (c) 1. Involve 30% or more of the girls in interscholastic activities.	(a) 1. Constant revision of elective courses by staff and students on a cooperative basis -- standing committee formed. 2. Use parent and student opinions and expertise to develop and review elective courses being offered. 3. Special curriculum counseling will be provided to each student with regard to scheduling. 4. Federal funds will be requested to operate experimently programs. 5. Use college/university and PDE curriculum specialists to aid in the development of elective courses. (b) 1. Survey students to ascertain what types of cocurricular programs are desired. 2. Eliminate all racial and sex barriers to cocurricular participation. 3. Provide late bus transportation for students participating. 4. Review school policy on homework in order to provide time.

s = secondary
e = elementary

NOTE: Be sure to indicate what strengths/weaknesses justify the proposed continuation or revision of goals and/or activities.

Section 11A - Page 1
(Pennsylvania Department of Education Sample Page for One Goal)

MANHEIM TOWNSHIP SCHOOL DISTRICT
LONG RANGE PLANNING
1973

I. Present Program Objectives
   A. At least one objective for the program in your department or subject area should be written to correspond with each of the 10 Basic Goals of Education.

      1. Objectives need not be written according to any particular style, however, when possible the statement recording the objective should indicate an accomplishment that can be measured.

      2. Objectives should stress our general program and services - not necessarily individual courses.

   B. Goals or objectives that have previously been written for the program in your department or subject area may be usable totally or in part, however, they must be evaluated and included as they reflect the 10 Goals of Basic Education.

   C. Proposed format for preparing and recording program objectives.

II. Present Program Activities
   A. At least one activity should be recorded for each objective listed. On the response sheet activities should parallel the objectives with which they are associated.

      1. Descriptions of activities should be as brief as possible.

      2. Abbreviations should be minimized in writing descriptions of activities unless well known and commonly accepted by the general reader.

   B. Persons responsible for implementing each activity (district administration, building principal, math teachers, guidance counselors, etc.) should be included with the description of each activity.

   C. Whenever possible activities included to support goals should feature equal educational opportunities for each child regardless of race, sex, academic standing, career choice, etc.

   D. Whenever possible recorded activities should include field experiences, use of community resources (people and places), work related experiences, etc.

III. Present Program Materials and Specialized Facilities
   A. As materials, either basic texts or specialized materials and equipment, parallel an activity, these items should be recorded as an extension of the objective and activity with which they are associated.

B. Any basic text materials can be briefly recorded by abbreviating publisher and title of material if possible.

C. Specialized equipment can be named without reference to make, model, etc.

IV. "Where We Want to Be" - PROGRAM

A. Review each program objective recorded under each Basic Goal in the previous section "Where We Are".

B. On the response sheet indicate the number of the Basic Goal and the number of the objective to which you are referring.

C. For each objective indicate the resulting program strengths or weakness that you believe might exist to suggest continuation or revision of that particular objective.

D. If a change in activities or materials might be considered, record examples that you believe might assist in reinforcing or revising the objective.

This section will provide insight that can be used as a base for in-service study with staff during the school term. As department head or subject chairman your "overall" knowledge of the subject area must be used to establish this base.

MANHEIM TOWNSHIP SCHOOL DISTRICT
WHERE WE ARE - PROGRAM

Date Submitted _____
Department or Subject Area _____
Person Completing Report _____

PROGRAM OBJECTIVES	PROGRAM ACTIVITIES	PROGRAM MATERIALS
INSTRUCTIONS: Under the Basic Goal record those general objectives presently used by your department or subject area. GOAL #V Quality education should help every child acquire the habits and attitudes associated with responsible citizenship. (Includes: Belief in welfare and dignity of others, respect for law and authority, demonstrate responsibility and integrity.)	INSTRUCTIONS: List those activities offered within your department or subject area that correspond with each objective recorded. (Please include those alternative activities as community resources-people and places-work related experiences, etc.). With each activity note person responsible to initiate (central administration, building principal, math teachers, guidance counselor, etc.)	INSTRUCTIONS: List those materials used with your department or subject area to develop activities.

"WHERE WE WANT TO BE" - SUGGESTED PROGRAM

NUMBER OF BASIC GOAL	NUMBER OF OBJECTIVE	STRENGTH OR WEAKNESS SUGGESTING CONTINUATION OR REVISION WITHIN A 5 YEAR PERIOD		
		PROGRAM OBJECTIVE	PROGRAM ACTIVITY	PROGRAM MATERIAL

Section 11B: Vocational Education

Pennsylvania has accepted the challenge to improve the quality of its entire educational program. This challenge includes the provision of programs for all children. Each school district must assess the needs of its students and provide a broad range of offerings. One such offering is the program of vocational education which meets the needs of a unique group of students. It is presumed that fifty per cent of the students in secondary programs need vocational education to obtain a marketable skill by graduation. The following items should be completed with the idea that each district should provide a quality program or is projecting a program for the future.

Item 1 - Check the appropriate type of vocational education offering that is being provided by the district.

Indicate whether your district "a" operates its own vocational program in a comprehensive high school; "b" participates in an Area Vocational-Technical school; "c" utilizes a combination of "a" and "b"; or "d" provides no program. A comprehensive high school refers specifically to a school having its own trade and industrial shops. Home economics, business education, and vocational agriculture are not considered as courses which make a high school program "comprehensive". Additional vocational and technical courses are necessary to meet this requirement.

Item 2 - If you checked item 1a or item 1c please describe your present vocational program and project the plans for future improvement. (Item 1c should reflect only the district portion of the vocational program.)

Item 3 - If you checked item 1d please describe the district's plan to provide vocational education for the students of the district.

There are certain factors that should (shall) be included when projecting your plans for providing or improving vocational education for the student of your school district. These are:

- Total secondary enrollment (public/nonpublic).
- Total number of secondary students that you project will be enrolled and can benefit from the program.
- Total per cent of secondary students who will benefit.
- Total number of secondary disadvantaged who can benefit from the projected program.
- Total number of secondary handicapped and the per cent who can benefit from the projected program.
- Total per cent of secondary dropouts.

- Total per cent of secondary students who have requested vocational education.

- Total per cent of secondary students who have dropped out of vocational programs.

The charts on the following two pages were prepared by the Pennsylvania Department of Education to assist local district personnel in gathering the data needed to make accurate program projections.

CATEGORY	DATA SOURCES OR DESCRIPTION OF DATA
Total Secondary Enrollment (Public Non-Public Grades 9-12)(Current Year Data)*	Public School Enrollment Report, DEAS-1059. Non-public School Enrollment Report, DEAS-1258. School Census: Summary of Enumeration of Children for the School Year 1974-75, DEAS-143. *NOTE: Current year data refers to the school year prior to an October submission date.
Projected Number of Secondary Students To Be Enrolled In Vocational Education (Grades 10-12)	Available school district historical data may be used to project the number of students that can benefit from the vocational education program. It is presumed that 50% of the students in secondary programs need vocational education to obtain a marketable skill by graduation. This figure will vary from district to district. However, for a statewide figure, please review the latest publication: PROJECTIONS, SELECTED EDUCATIONAL STATISTICS FOR PENNSYLVANIA, prepared by the Division of Educational Statistics, Pennsylvania Department of Education.
Per Cent of Secondary Students To Benefit From Vocational Education	Divide the projected number of secondary students to be enrolled in the vocational education by the total secondary enrollment.
Total Secondary Disadvantaged Who Can Benefit From Vocational Education	Use ESEA Title I information by the Bureau of Statistics to the district.
Total Secondary Handicapped And Per Cent	School Census: Summary of Enumeration of Children For The School Year 1974-75, DEAS-1258. I. U. Director of Special Education
Total Secondary Drop-out	Annual Attendance Report-DEBE-482-Rev. 6/72
Per Cent of Students Requesting Vocational Education	Available school district historical data obtained through student interest surveys or from counselor records.
Per Cent of Secondary Students Who Dropped Out of Vocational Education	VEMIS STUDENT FORM-DEBE-750S-Year-End Status of Secondary Students (Printout of students enrolled in vocational education released to districts in the spring.)
Vocational Education For Adults	For purpose of economy, maximum utilization of resources and minimizing duplication of facilities, many districts use secondary school vocational laboratories or shops to meet the needs of out-of-school youth and adults. In brief narrative form describe the district's plan to provide vocational education to adults.

The chart which follows may be useful as a worksheet format to assist districts in preparing a statistical profile to examine the vocational education opportunities for students.

Data Factors	W. S. Snyder Jr. Sr. High School	Middleburg Jt. Jr. Sr. High School
74-75 Enrollments* Grades 10-11-12----Total	294	378
June 1974 Graduates----Number	90	115
College-Other----Number	25	25
Continuing Education-Percent	28	22
Percent Available Vo-Ed	72	78
Number Available Vo-Ed	212	294
73-74 VEMIS Vo-Ed Enrollments** Less 09.01----Total	157	232
Reported AVTS Enrollment	92	104
High School Enrollment	65	128
Percent Available Enrolled Vo-Ed	74	79
Enrolled in Home Economics*** 09.01	55	62

* Data obtained from A Listing of Pennsylvania Public Schools Having Secondary Enrollments 74-75, Bureau of Information Systems, PDE 1975

** VEMIS, Vocational Curriculum Enrollment Directory (Secondary) School Year 1973-74, PDE - Bureau of Vocational Education

*** This figure represents those pupils enrolled in useful home economics, 09.01, available to enroll in other vocational programs with an occupational objective.

The responses should include a list of the programs provided. The procedure for working with the vocational technical school to identify new course needs, revisions in program, provision for general as well as special education students should reflect a cooperative form of needs assessment and program planning. Item 1b should be included under item 2 by describing present and future vocational programs available from the Area Vocational Technical School and the means of planning these programs.

In order to plan projections for vocational needs, local school districts are urged to work cooperatively with area vocational technical programs, post-secondary programs and related resources available to students for vocational education. The vocational technical school is an extension of the home high school in all but a very few cases. As such, the long range planning process takes place as part of the home high school planning. The vocational technical school should provide overall data to the home school districts it services. The responsibility of the vocational technical school director is to plan for the demands which will be made upon his school by local districts and to work with local districts in determining future needs and appropriate plans.

In the case of the vocational technical schools which have self-sufficient programs, special arrangements will be worked out of the Pennsylvania Department of Education for the filing of long range plans. In all other cases the plans are filed by the individual school district.

The following criteria will be used as the basis for examining "Long Range Plan Section 11B: Vocational Education" by Pennsylvania Department of Education personnel.

Section 11B
Vocational Education

Item 1. Is the district providing a vocational education program for its students?

Item 2. Does the present and projected plan for improving the vocational education program contain all of the factors listed? (Section 11B, Factors to be Considered)

Item 3. Does the projected plan describe, in detail, provisions for providing vocational education programs to the students?

Section 11C: Special Education

The education of exceptional children is one of the vital responsibilities of Pennsylvania schools. The responsibility is met in the intermediate units and the Department of Education. The mandate of law afford every exceptional child ready accessibility into an appropriately designed educational program. The following items should be completed with the idea of providing the best possible program and projecting future programs.

All Pennsylvania school districts have a written special education plan in accordance with the Phase II prototype plan. The information contained in this plan is sufficient to complete Section 11C: Special Education of the Long Range Plan. As the Phase II plan is year to year in nature, the district should analyze its components and make the necessary five year projections for "the projected services" portions of the long range plan.

Item 1 - Does your school district participate in a special education program operated solely by the intermediate unit?

The intermediate unit Phase IIB plan includes provisions for any school districts who operate no special education program of their own. Refer to this plan in outline form to describe those intermediate unit special education services utilized by district pupils in item 4.

Item 2 - Does your school district operate its own special education program?

Item 3 - Does your school district operate some type of combination program (school district/intermediate unit/private school or agency)?

The intermediate unit Phase II plan and Director of Special Education should be consulted to determine what future services will be available. This should be taken into consideration by districts operating their own programs as well as those in combined programs of delivery.

Item 4 - If your district participates in a special education program operated by the intermediate unit, please explain the present program and project your plans for providing an improved program in the future.

Item 5 - If your district operates its own special education program, please describe the present program, and the projected plans for improving the program. Include programs for all children with exceptionalities.

Item 6 - If your district participates in some type of combination program, please explain the present program and project your plans for providing an improved program in the future.

When responding to items 4, 5 or 6, please consider the following factors to be included in the plan.

- A referral system for special education children.
- A cumulative record system for each child.
- An adequate reporting system.
- The adherence to General Curriculum Regulations and the Standards for Operation of Special Education Programs and Services.
- Provisions for children to move into the regular educational program on an individual basis.
- Is provision made in the plan to provide vocational education where warranted?
- The plan complies with Acts 194 and 195.
- A provision for placing special cases in private schools or state agencies (school for the blind, etc.)
- The plan for evaluating the program and the achievement of the children.

Section 6.0 describes the preparation of program plans and the procedures for each exceptionality. Sections 6.0 through 6.14 describe the special education delivery process for specific segments of the programs involving direct service for pupils.

Each of these sections includes a philosophical statement, (6.-.0) definition of exceptionality, (6.-.1) goals (6.-.2) and measurable objectives (6.-.3) for that segment of children served, implementation and operational procedures, (6.-.4) relationships of the program to vocational education, (6.-.4.2.4.) evaluation procedures (6.-.1.4.3.) and recommendations for change, (6.-.4.4.). In items 4, 5, or 6 the description of "Present" program offerings can be compressed by referring to the Phase II plan and noting the specific sections documenting program descriptions for each exceptionality after writing a short statement or preparing an outline to describe the special education program. For example, a district might write:

4. Present (Intermediate Unit)	Projected
From among the special education services offered by the Capital Area Intermediate Unit, the _____school district sends pupils to the programs listed below. The numbers preceding the type of service refer to the section of the Capital Area Intermediate Unit Phase II plan describing in full the philosophy, definition, goals, objectives, implementation and operation, and relationship of the service to other program offerings. a. 6.1 Mental Retardation, Severe and Profound. . . . . 1 student b. 6.4 Socially/Emotionally Disturbed . . . . . 5 students c. 6.8 Visually Handicapped. . 1 student	

In preparing the "Projected" portion of items 4, 5, or 6 the local district will need to refer to the 6.-.4.4 sub-sections (Recommendations for Change) under each exceptionality described in sections 6.0 through 6.14 of the Phase II plan. Section 11.0 (Critical Problem Areas) should also be reviewed thoroughly with the five year projection in mind. Specific reference should be made to intervention programs and plans to remediate needs identified in sub-section 6.-.4.4. and Section 11.0 of the Phase II plan.

All areas covered in the criteria for evaluating items 4, 5, and 6 are included in the Phase II plan as indicated below.

The following criteria will be used as the basis for examining "Long Range Plan Section 11C: Special Education" by Pennsylvania Department of Education personnel.

Section 11C
Special Education

Items 1, 2 and 3 - Is the school district providing special education programs?

Items 4, 5 and 6 - Does the plan include a system for referral of special education children?

Section 6.14 describes diagnostic and consultative services. These psychological evaluations provide the basis for referral.

- *Does the plan refer to the development of a system of record-keeping and provide a reporting system?*

The new program developed under Title VI, B will provide a comprehensive child tracking and data collection system.

- *Does the plan for the district operation of special education adhere to general education curriculum standards the the standards for the operation of special education programs and services?*

The Phase II plans currently on file at the intermediate unit office follow these standards. Section 6.0-6.14 detail specific programs and services offered within these mandates. Section 4.0 discusses the state standards for each exceptionality.

- *Does the plan include provision for maximum movement between general and special education programs, at least on an individual basis?*

Mainstreaming statements appear in Sections 6.0-6.14 in sub-section 6.-.4.

- *Does the plan indicate participation or planned participation for special education students in vocational education?*

Sub-section 6.-.4.2.2. explains vocational education participation as it relates to each exceptionality in Sections 6.0-6.14.

- *Does the plan indicate compliance with Acts 194 and 195?*

Since these acts have been ruled unconstitutional, this item no long applies.

- *Does the plan refer to relationship or planned relationship with other state and private agencies such as Mental Health and Mental Retardation Base Service Unit, Special Education Regional Resource Center, Educational Development Center, Information Materials Center, other state and local agencies?*

Sub-sections 6.-.4.2.3. through 6.- 4.2.5. note these relationships for each exceptionality in Sections 6.0-6.14.

- *Does the plan indicate that formal internal and external student evaluations and formal program evaluation is conducted regularly?*

Sections 6.0-6.14 include formal and informal student evaluations both on an internal and external basis in sub-sections 6.-.4.3. Formal program evaluation is also discussed in Section 9.0.

Section 11D: Educational Programs and Services (Intermediate Unit Services)

There are certain mandated services provided by the intermediate units to which school districts are entitled. These services are as follows:

- Curriculum development and instructional improvement services.
- Educational planning services.
- Instructional materials services.
- Management services.
- Continuing professional educational services.
- Pupil personnel services.
- State and federal liaison services.

Programs and services by the 29 intermediate units are generally identified and adapted according to the unique needs of the constituent districts.

Item 1 - List and describe the projected (needed/desired) mandated services to be provided and/or conducted for the district by the intermediate unit.

Item 2 - List and describe the projected services (contracted services), other than mandated services, that are to be provided and/or conducted for the district by the intermediate unit.

Each intermediate unit should maintain a needs assessment process to gather data on service needs and utilization rates and to assist in establishing priorities. As of this writing no uniform needs assessment process or instrument is mandated. However, all twenty-nine Pennsylvania intermediate units have responded to two calls for evaluative data. This information is available in the Intermediate Unit Operation Annual Report 1971-72 and 1972-73, Pennsylvania Department of Education, 1974, and in the Intermediate Unit Study for the year 1973-1974 conducted by the Legislative Budget and Finance Committee of the Pennsylvania State Legislature. These two reports can provide baseline data for an ongoing needs assessment program.

The Capital Area Intermediate Unit (#15) and the Lancaster-Lebanon Intermediate Unit (#13) provided Section 11D information to their long range planning cycle one districts. In the Capital Area Intermediate Unit, a worksheet was prepared detailing the services offered in a format consistent with the items in Section 11D of the long range plan. This worksheet assisted districts in their total examination of the Capital Area Intermediate Unit services and was accompanied by a brochure ("The Capital Area Intermediate Unit - What It Does And Can Do For: Educators, Young People, Board Members, Citizens."). This narrative description of services provided clarification to assist districts in completing the worksheet. Upon completion of the worksheet, those mandated and additional services projected as future needs by a district were extracted and listed on the appropriate long range planning forms. A copy of the worksheet follows. Each intermediate unit's program of services will provide the necessary information to prepare a similar, but locally appropriate worksheet to assist districts in completing Section 11D.

Capital Area Intermediate Unit
Serving school districts in Cumberland, Dauphin and Perry Counties

W O R K S H E E T
Capital Area Intermediate Unit Services:
Section 11D Pennsylvania Long Range Plans

MANDATED SERVICES:	These mandated services are currently provided to this district by the intermediate unit.	These mandated services are projected as needed/ desired by the district to be provided by the intermediate unit.
1. Curriculum Development and Instructional Improvement Services		
a. Curriculum Advisory Committee		
b. Publications, research services		
c. Workshops, consultant services		
d. In-service programs		
2. Educational Planning Services		
a. Planning procedures in curriculum workshops, resource services		
b. Planning, development and improvement in special education		
c. National planning information dissemination		
d. Assistance with Pa. Long Range Plans procedures		
e. Assistance in management by objectives and other planning models in administration		
3. Instructional Materials Services		
a. IMS program - distribution, production, technical services		
b. Orientation and in-service		
c. Catalog		
d. Advisement on appropriateness of media to curriculum		

MANDATED SERVICES:	These mandated services are currently provided to this district by the intermediate unit.	These mandated services are projected as needed/ desired by the district to be provided by the intermediate unit.
e. Coordination of instructional media in IU, districts, liaison with PDE, PBS, & community		
4. Management Services		
a. Computer needs assessment for PECS		
b. Business managers committee		
c. Bulk purchasing		
d. Statistical data gathering and dissemination		
e. School building surveys		
f. Consulting services		
g. Newsletter		
h. Directory for CAIU		
i. Coordinate negotiations		
j. Advise student forums		
k. Coordinate special projects		
5. Continuing Education Services		
a. Workshops, conferences, consulting services		
b. In-service programs		
6. Pupil Personnel Services		
a. In-service programs		
b. Conferences, workshops		
7. State and Federal Liaison Services		
a. Resources available from state & federal agencies		
b. Serve as LEA for selected programs		
ADDITIONAL SERVICES PROVIDED TO CAIU DISTRICTS:	These services are currently provided to this district by the intermediate unit.	These services are projected as needed/ desired by the district to be provided by the intermediate unit.
8. Nonpublic School Services Under Act 194		
a. Administration and program services		
b. Budget control, personnel employment, purchasing		
c. Needs assessment		

ADDITIONAL SERVICES PROVIDED TO CAIU DISTRICTS:	These services are currently provided to this district by the intermediate unit	These services are projected as needed/ desired by the district to be provided by the intermediate unit.
9. Nonpublic School Services Under Act 195		
a. Administrative and program services		
b. Budget and fiscal control purchasing		
c. Needs assessment		
10. Special Education Programs & Services		
a. Identification of special education needs		
b. Operation of classes		
1) full-time classes for TMR, EMR, LD, SED, hearing impaired and PH children		
2) itinerant programs-sight, hearing,speech		
3) resource programs-LD & gifted		
c. Psychiatric services		
d. Psychological testing & consultative services		
e. Supervisory services		
f. Workshops		
g. Coordination and cooperation of community agencies		
h. Federal funding where appropriate		
11. Vocational-Technical Education		
a. Administrative services for Dauphin Co. and Cumberland/ Perry Vo-Tech Schools		
b. Advisement and liaison to boards, committees, advisory groups, PDE		
c. Development of new vocational programs		
d. Financial and statistical information re: vo-tech education		
e. Vocational guidance including PENNscript		

ADDITIONAL PROJECTED SERVICES, OTHER THAN MANDATED SERVICES AND ADDITIONAL SERVICES AS NOTED ON PRECEDING PAGES, NEEDED/DESIRED BY THE DISTRICT FROM THE INTERMEDIATE UNIT ARE:

12. _____

13. _____

14. _____

Needs assessment and program evaluation of Capital Area Intermediate Unit services include regular input from the Superintendents' Council and the Curriculum Advisory Council, feedback from subscribers of Capital Area Intermediate Unit services, utilization rates, and Program of Services evaluations conducted by the Capital Area Intermediate Unit in the spring of 1974, fall of 1974, and spring of 1975, as well as the Intermediate Unit Operation Report prepared by the Pennsylvania Department of Education in 1974, and the Intermediate Unit Study for the year 1973-74 conducted by the Legislative Budget and Finance Committee of the Pennsylvania State Legislature. Future Capital Area Intermediate Unit services are planned using the above sources as a data base.

The Lancaster-Lebanon Intermediate Unit took a similar approach. During a workshop, superintendents from intermediate unit #13 districts responded to a questionnaire scaled to reflect the quality of services provided in mandated and additional areas.

The questionnaire consisted of a detailed list of intermediate unit services with a response sheet. The scales were:

"If YES is the response then rate the service:

5	4	3	2	1
Excellent	Good	Average	Below Average	Poor

If NO is the response then evaluate on the following scale:

5	4	3	2	1
Urgent	Highly Desirable	Desirable	Would desire but view it as low priority	No need for IU to provide"

Central tendencies were tabulated and this information was provided to districts to assist them in responding to Section 11. Districts should consult their intermediate unit office for needs assessment and program evaluation data applying to the intermediate unit to which they belong.

The following criteria will be used as the basis for examining "Long Range Plan Section 11D: Intermediate Unit Services" by Pennsylvania Department of Education personnel.

Section 11D
Intermediate Unit Services

Item 1 - Are all of the projected mandated services listed and described for this school district?

Item 2 - Are projected contractual services listed and described by the district?

Section 12: School Facilities

Future school building needs, as part of the long range planning process, should be reviewed by the advisory committee as a preliminary step to the initiation of a new school facilities program.

Present and future school building needs should be determined on the basis of existing facilities, the projections of community growth patterns, racial distribution and the projection of public school enrollments.

The school district building plan chart should indicate:

- Existing schools to be retained or expanded, their optimum capacities, year built, condition and site acreage.
- Existing school plants or segments of plants to be maintained or abandoned.
- New schools to be established, proposed capacities and date of expected occupancy.

See School District Building Plan Chart (Elementary-Page 1, Middle/Jr. H.S.-Page 2, Senior H.S.-Page 3, New-Page 4.)

Consistency is the most important factor in reporting facilities. Use the same interpretations and data base for all buildings. This section is concise and should not require background research to complete. Specifics regarding Act 34 of 1973 can be found in Section 62-000 of the Basic Education Handbook, and in Basic Education Circulars 136 and 61-75.

Item 1a. List the name of facilities, site address, including post office. If this is a new building, please designate the type of elementary, middle school, junior high or senior high.

If the facility is on an educational park type of complex, deal with each school as if it were a separate location. Form DEAS-152A, School Building Change Report, may assist in completing item 1.

Item 1b. Record the year built and include year of completion of additions, renovations or additions. Indicate the projected year of occupancy for <u>new</u> buildings.

All internal renovations are to be noted. Painting buildings on a five year schedule or replacing a roof are considered maintenance and should not be noted. Renovations include such changes as conversion of classrooms to offices, new lighting, plumbing improvements or updating a science laboratory. Any

change which increases the capacity of the building is an addition. For example, instead of merely replacing a roof as previously noted the roof might also be raised and an additional story of classrooms created. This would be reported as an addition. An addition will have an effect on the rated capacity of a building and will increase the square footage in the building. It is possible to increase pupil capacity through renovations (which do not affect the size of the building) by converting auditoriums or office space to classrooms. As the building remains the same size, the change is not deemed an addition.

Item 1c. Indicate the condition of the facilities (E-Excellent, VG-Very Good, G-Good, F-Fair, P-Poor). An appraisal process by a citizen committee (along with school personnel) should take several items into consideration. Buildings should be evaluated with respect to condition, site, structural and mechanical features, environment, safety, utilization of space and maintainability.

An appraisal process involving a citizen's committee should be part of this item. Citizens will be interested in the actual condition of the buildings in their district. Such involvement will be essential in gaining understanding and support for district building programs. Publications such as Appraisal Guide For School Facilities by Harold L. Hawkins (Pendell Publishing Company, 1973) can assist in obtaining an objective appraisal of facilities by school personnel and citizens.

Item 1d. Indicate site acreage for each existing or new facility.

In this section only the actual acreage available for a specific building is reported. If the district has an elementary and a secondary school on the same ninety acres in an educational park arrangement, the acreage surrounding the elementary school must comply with Section 3-200, School Building Sites Standards for School Buildings. The same is true of the secondary school. Acreage is not counted twice nor is it reported as one large plot of land for both schools.

Another consideration is acreage used but not owned by a school district. Land owned by a municipality may adjoin a school and be considered a part of the site acreage for building permission and use. If such an exception was approved for the building, note should be made on the report but the actual acreage given for 1d should be that owned by the district. (Loaned or leased land can always be retrieved by the owner.) This situation is often found in city schools because of the high real estate prices and the age of some school sites.

Item 1e. Indicate the total pupil capacity. For new facilities, project pupil capacity.

Rated pupil capacity refers to the authorized capacity of the building rather than to its total enrollment. This is the figure to be reported for item 1e. Over crowding or under utilization of facilities will show up in examination of the total report. Projections for future buildings should be based upon the same techniques used to report figures in Section 8.

Item 1f. Complete the bar chart. Use the legend for each listed building.

The following criteria will be used as the basis for examining "Long Range Plan Section 12: School Facilities" by Pennsylvania Department of Education personnel.

Section 12
School Facilities

Item 1

a to b — *A building must be in poor condition and/or sufficient age to warrant a new building.*

a to d — *The site acreage is reasonable and adequate for the facility. Acreage complies with the mandate of Section 3-200, School Building Sites Standards for School Buildings.*

a to f — *The abandonment schedule is realistic. All questionable abandonment or addition schedules are educationally justifiable.*

a to b to e — *Renovations or additions to relatively new buildings must be justified in terms of pupil capacity or other educational reasons.*

Section 13: Financial Information

In a determination of the district's financial position, sufficient appraisal of the current and future resources and obligations is required. Each district should report the following information in its long-range plan:

The bulk of the data required by this section can be obtained from the annual financial report submitted by the school district to Pennsylvania Department of Education. Throughout this section "Current Year" refers to the school year prior to a September submission date. Thus the financial information cannot be considered complete until the budget and financial data are compiled for the year prior to the long range plan's submission. Use what "is" rather than what "could be" whenever possible as the foundation for project.

Item 1a. List the annual assessed valuation of real property in the district for the current year and project the future annual assessed valuation (Annual Financial Report, Page 4).

When new assessments are underway, projections may be difficult. Contested reassessments further complicate matters. Work with the municipal and township authorities to ascertain the most accurate projections possible in any event.

Item 1b. List the total net resources from all sources in the district for the current year and project future net resources (Annual Financial Report, Page 9).

Chamber of Commerce projections, census information, construction permits, planning commission reports and building industry projections should be taken into consideration along with past history in the district regarding building rate and increases in resources. The local and national economic picture also effects this item. Eight to ten percent increase per year is commonly the case today.

Item 1c. List the total debt service for all obligations in the district for the current year and project future debt service (Annual Financial Report, Acct. 1300, Page 9).

All leasing, mortgages, interest and other debt service are included in this item. Most districts do not exceed fifteen percent of their total resources for this item. Everything comprising the total financing of a district's buildings is taken into consideration.

Item 1d. List the percentage that total debt service is of the total net resources for the current year and project future percentage.

NOTE: Current Year refers to the school year prior to a September submission date.

When tht total debt service approaches or exceeds twenty-five percent of the total net resources, a district should review its financial status. Local considerations may mitigate the twenty-five percent figure but it is considered a general guideline and could prompt the Pennsylvania Department of Education reviewers to look in depth into Section 13.

At the time this guide was prepared, there were no written criteria for evaluating Section 13: Financial Information. Administration data of Sections 691-695 (as amended) of the Public School Code of 1949 are available from the Pennsylvania Department of Education, Division of Management Services. This information spells out procedures and criteria for dealing with districts defined as financially distressed.

QUESTIONS AND ANSWERS ABOUT THE PENNSYLVANIA LONG RANGE PLAN

In January of 1975, representatives of the ten professional organizations belonging to the Council of Organizations for Education (COE) met with a panel composed of Donald M. Carroll, Jr., Commissioner for Basic Education; Paul S. Christman, State Board of Education; and James H. Rowland, Sr., State Board of Education Chairman. A summary of the questions posed by the organizations and responses made by the panel follows.

PENNSYLVANIA ASSOCIATION OF ELEMENTARY SCHOOL PRINCIPALS (PAESP):

Will subsidies to the districts be affected by results of Long Range Planning?

Donald Carroll: This approach had not been effective in Michigan. I do not feel the Pennsylvania legislature is moving this direction.

PENNSYLVANIA ASSOCIATION OF FEDLRAL PROGRAM COORDINATORS (PAFPC):

Are additional funding sources being considered to subsidize Long Range Planning?

James Rowland: The State Board of Education has made no recommendation for financing Long Range Planning. The State Board does recommend increased general subsidies which can be allocated among the various needs a local district has according to its own priorities.

PENNSYLVANIA ASSOCIATION OF SCHOOL ADMINISTRATORS (PASA):

Please define more specifically the function of citizens advisory committees in Long Range Planning.

Paul Christman: Long Range Planning should be an ongoing process which begins at the grassroots level. Local control is very important. Every school person should be held accountable for continual planning. Long Range Planning is simply interpreting trends. Approach it as an opportunity, not as a chore that has been imposed.

James Rowland: The citizens advisory committee concept should include citizens, parents, students, and educators to develop Long Range Plans for the school district.

Donald Carroll: The State Board is not in a position to appropriate funds.

Paul Christman: The Citizens Commission Report would indicate good financing of public education in Pennsylvania in the future. The State Board is studying recommendations to the legislature for a total financial approach rather than additional categorical funding.

PENNSYLVANIA ASSOCIATION OF SECONDARY SCHOOL PRINCIPALS (PASSP):

What is meant by the affirmative action section in light of existing federal regulations regarding collection of such data?

Donald Carroll: There is nothing in the Long Range Plans to violate federal law.

PENNSYLVANIA ASSOCIATION FOR SUPERVISION AND CURRICULUM DEVELOPMENT (PASCD):

How will the Long Range Plans be evaluated in the Pennsylvania Department of Education? What provision will be made for individual interpretations among the various persons screening the plan?

Donald Carroll: The Bureau Chief has overall responsibility although other people assist him. He will insure that it is weighed against the approved criteria which have been established. These criteria will be shared with the school superintendents well in advance of submission dates for the Long Range Plans.

VOCATIONAL ADMINISTRATORS OF PENNSYLVANIA (VAP):

How should the area vocational-technical schools plan for adult and post-secondary education in relation to community colleges in conjunction with their Long Range Planning?

JAMES ROWLAND: Apart from adult and post-secondary education, schools should provide a good basic education. The focus is on local districts for Long Range Plans.

PENNSYLVANIA DEPARTMENT OF EDUCATION PROFESSIONAL ASSOCIATION (PDEPA):

How can participating districts make Long Range Plans until the vocationa-technical schools are required to submit plans?

Donald Carroll: The vocational-technical school is an extension of the home high school in all but a very few cases. As such, the Long Range Planning process takes place as part of the home high school planning process. The vocational-technical school would provide overall data to the home school districts it serves. This does raise an area of special consideration for the vocational-technical schools having self-sufficient programs.

PENNSYLVANIA ASSOCIATION OF INTERMEDIATE UNITS (PAIU):

New duties for the Intermediate Units are continually being assigned. This includes Long Range Planning.

Paul Christman: I view the Intermediate Units with interest. I am heartened by the evaluation report of their services in comparison to the county structure which superceded them. The future of Intermediate Units is great as services are developed where desired by member districts.

Donald Carroll: Intermediate Units exist to serve the districts. The districts have an opportunity to develop the Long Range Planning service at the Intermediate Unit level and at the district level to the degree they feel it is desired and needed. This is not a support service being dictated by PDE to Intermediate Units.

PENNSYLVANIA ASSOCIATION OF SCHOOL ADMINISTRATORS (PASA):

May school districts submit a Long Range Plan prior to a school district's scheduled cycled time?

Donald Carroll: Evaluation has been staggered over a five year period for the Long Range Plans. This will insure the stratification for EQA and a fairly even flow of Long Range Plan reports through PDE. It may be possible if a district has pressing reasons to submit a plan at an earlier date.

PENNSYLVANIA ASSOCIATION OF SECONDARY SCHOOL PRINCIPALS (PASSP):

Will local districts be permitted to erect prefab buildings as permanent housing for educational programs under the Long Range Plans and the new health and physical education regulations?

James Rowland: There are no regulations existing in this regard other than the building codes which are fairly flexible.

PENNSYLVANIA ASSOCIATION FOR SUPERVISION AND CURRICULUM DEVELOPMENT (PASCD):

What is really meant by community involvement?

James Rowland: Students, teachers, and parents all have an opportunity to participate in providing input for planning. Every segment of the community should be given an opportunity for input. In the final analysis the local school board makes the decisions, but prior to that all views should be heard.

Donald Carroll: Acting without input from all levels of the citizenry simply opens a school district to criticism.

James Rowland: The administration should show leadership and provide plans and programs for the community representatives to react to.

Paul Christman: The community is made up of individuals and organizations. Both should be included.

PENNSYLVANIA DEPARTMENT OF EDUCATION PROFESSIONAL ASSOCIATION (PDEPA):

What will be the nature of "sanctions" if a school district's Long Range Plan is not acceptable?

Donald Carroll: The requirement is for a Long Range Plan. There are no legal standards although PDE has developed criteria by which the plan will be evaluated. Development of the plan should be a mutual process which results in all Long Range Plans being in an approvable format by the time they are ready to be submitted to us. Failure to submit the plan could result in withheld subsidies or decommissioning of personnel or board members for failure to act.

VOCATIONAL ADMINISTRATORS OF PENNSYLVANIA (VAP):

What involvement should the vocational director have in Long Range Planning for each school district he serves?

James Rowland: The vocational-technical school director has to plan for the demands which will be made upon his school by local districts. He should work in cooperation with the local districts to determine future needs and appropriate plans. The Long Range Plan itself is submitted by the individual school districts.

PENNSYLVANIA ASSOCIATION OF INTERMEDIATE UNITS (PAIU):

In the Long Range Plan for Special Education, what provision is made for Intermediate Unit and district level planning?

Donald Carroll: Phases I and II of the Special Education Long Range Intermediate Unit and District Plans are being re-examined by the State Board of Education. This material can be used as the data base for preparing Section 11D of the District Long Range Plan.

CLOSING REMARKS

The panel expressed unanimity in the feeling that the legislature, the State Board, the school districts, and all levels of the public must work together for the benefit of children and better education. Long Range Planning is necessary to provide optimal service for all learners in the state. Mr. Christman advised participants to be "guided by the experience of the past; revere the past, be reasonably tolerant of the present, and terribly impatient for the future."

THE PENNSYLVANIA LONG RANGE PLAN: SELECTED REFERENCES

1. _____, Operations Notebook No. 3: A New Challenge-Planning for Declining Enrollment, Association of California School Administrators.

2. Hawkins, Harold L., Appraisal Guide for School Facilities, Pendell Publishing Company.

3. School Administrators' Handbook, 61-355, February 1, 1968, Pennsylvania Department of Education. The following resources can provide data pertinent to a district's long range plan preparation. Districts should make direct contact as they deem necessary.

"a. Local, county and regional planning commissions.
b. State Planning Board, Governor's Office, Harrisburg, Pennsylvania.
c. Bureau of Community Development, Pennsylvania Department of Commerce, Harrisburg, Pennsylvania.
d. United Stated Bureau of Census Report for 1970 and preceding decades.
e. Bureau of Research, Department of Public Instruction.
f. Pennsylvania Department of Health, Division of Vital Statistics.
g. Municipal, township and county officials.
h. Local historical societies.
i. Local and State chambers of commerce.
j. United States Geological Survey.
k. United Stated Department of Agriculture - aerial maps.
l. Pennsylvania Department of Highways - Bureau of Advanced Planning.
m. Pennsylvania Department of Internal Affairs - Bureau of Statistics.
n. Aerial photographers.
o. Telephone and power companies operating in the area. These organizations often make long range studies for planning purposes.
p. Pennsylvania Human Relations Commission, Harrisburg, Pennsylvania.
q. Decision of Pennsylvania Supreme Court, Middle District, September 26, 1967, Pennsylvania Human Relations Commission versus Chester School District."

4. Pennsylvania Department of Education References

Districts preparing their long range plan may wish to secure copies of the following Pennsylvania Department of Education publications.

Long Range Planning Part I: Guidelines and Instructions, Pennsylvania Department of Education, 1974.

Long Range Planning: Internal Processing Procedures, Pennsylvania Department of Education, 1974.

Long Range Planning: Instructions for Completing Update Sections, Pennsylvania Department of Education, 1974.

Long Range Planning: Review Criteria, Pennsylvania Department of Education, 1974.

FORMS:

Long Range Plan Part II: Forms, Pennsylvania Department of Education, 1974.

RESOURCE PEOPLE:

Long Range Planning: Contact and Liaison Persons, Pennsylvania Department of Education, 1974.

BACKGROUND INFORMATION:

Long Range Planning HOW TO DO IT, A Working Paper, Pennsylvania Department of Education, 1974.

A Generic Planning Process Model and Manual, Pennsylvania Department of Education, 1972.

CROSS REFERENCE: THE PENNSYLVANIA LONG RANGE PLAN AND LONG RANGE PLANNING GUIDE FOR SCHOOL DISTRICTS

The columns below indicate the correlation between each section of the Pennsylvania Long Range Plan and corresponding chapters of the Long Range Planning Guide for School Districts.

PENNSYLVANIA LONG RANGE PLAN	LONG RANGE PLANNING GUIDE FOR SCHOOL DISTRICTS
Section 1: Introduction	Chapters 1 and 2
Section 2: Utilization of the Plan (Objectives)	Chapter 3
Section 3: Definition of Terms	Chapter 3
Section 5: Community Involvement	Chapters 4 and 9
Section 6: Administrative Unit	Chapter 9
Section 7: Staff Development	Chapter 9
Section 8: Pupil Enrollment Projections	Chapter 9
Section 9: Educational Quality Assessment	Chapters 5, 8, and 9
Section 10: Equal Educational Opportunities	Chapter 9
Section 11A: Educational Programs and Services (Goals, Objectives and Activities)	Chapters 6, 7, 8, and 9
Section 11B: Vocational Education	Chapter 9
Section 11C: Special Education	Chapter 9
Section 11D: Educational Programs and Services (Intermediate Unit Services)	Chapter 9
Section 12: School Facilities	Chapter 9
Section 13: Financial Information	Chapter 9